

## Outlook Synchronisation Setup and Use

Rest Professional MS Outlook Integration enables you to push action diary entries from the Rest Professional Diary to your Microsoft Outlook Calendar, and synchronise contact details from Rest Professional with Contacts within Microsoft Outlook.

This enhancement gives you access to appointment and contact information while on the road via your laptop and/or Smart Phone when integrated with Microsoft Outlook 2003 or above.

**NOTE:** Rest to MS Outlook Synchronisation is a **one way synchronisation** and is not compatible with Outlook Express, Lotus Notes, Hotmail or Gmail.

### Setting up Outlook Synchronisation

To get started with Outlook Synchronisation the feature need to be activated in System Options by a user with the highest security level **Statistics/Company Details/Passwords & Above:**

1. Click **Other > Utilities > System Options > Mobile Tab**
2. Select the appropriate checkboxes **Enable synchronisation of Rest contacts with Microsoft & Outlook** and/or **Enable synchronisation of Rest Diary with Microsoft Outlook**



### Setting up User Synchronisation of Rest Professional Contacts and/or Rest Professional Diary

The Synchronise feature needs to be activated for each Rest Professional user. This must be done by a user with the highest security level (**Statistics/Company Details/Passwords & above**).

### **Syncing Contacts:**

There are two options for each User, you can either synchronise **All** Rest Professional Contacts or Property Managers can select **Portfolio** to only synchronise contacts they are assigned as a Property Manager. Note this doesn't apply to Other Managers.

### **Syncing Diary:**

This option is available for Property Managers only. This feature allows the user to synchronise Linked Action Required Diary items and / or Commercial Diary items for which they are the Property Manager. Only items relating to properties or people in their portfolio will display.

### **To activate the Synchronisation of Contacts and Diary for a Rest user:**

1. Click **Files > User**
2. Click **Search – F7**.
3. Select the User you wish you edit from the **User List** and click **OK**.
4. Click on the **User Profile** tab, and in the Outlook Synchronisation section select the appropriate option from the **Sync Rest Contacts** dropdown list:
  - **ALL:** Synchronise all Rest contacts.
  - **Portfolio:** This option is available for Property Managers only and synchronises only contacts that are assigned to that Property Manager.
5. Select the **Sync Rest Diary** to synchronise the Rest diary and Outlook Calendar. **This option is only available for Property Managers.**



**NOTE:** When Outlook Synchronisation is set up for a user there will be a new toolbar shortcut available for Outlook Synchronisation

## Processing an Outlook Synchronisation of Contacts

**NOTE:** Microsoft Outlook must be open when processing a synchronisation.

1. Click **Other > Outlook Synchronisation**, or click the toolbar shortcut  .
2. On the **Outlook Synchronisation** screen, select the types of **Contacts** you wish to sync.
  - If **owners and/or tenants** are selected and the user is set up to sync **All Property Managers**, a list of the property managers displays. Clear the checkbox for any property manager whose portfolio you do not want to sync. If the user is set up to sync Portfolio, only contacts from their portfolio will be synced.
  - Checking **Creditors** will synchronise all contacts because creditors aren't assigned a Property Manager's portfolio.
3. Click **Sync**.
4. A message will display summarising the number of contacts that have been sent to your Outlook Contacts.

**Note:** Outlook Sync will not automatically Sync, it will only sync when this is done manually by the user.

Contacts will display in your Microsoft Outlook Contacts list; new folders for each contact type synchronised will be created.

## Processing an Outlook Synchronisation of Diary Items

**Note:** Microsoft Outlook must be open when processing a synchronisation.

1. Click **Other > Outlook Synchronisation** or Click the toolbar shortcut  . The **Outlook Synchronisation** screen will display.
2. Enter the **From Date** and **To Date** for the range of Diary items that you wish to synchronise. Rest will default to the next 4 months.
3. Select the Diary Types you wish to synchronise.

- **Action Diary**, which will synchronise all Linked Action Required items that are not completed.
  - **Commercial Diary**, which will synchronise Commercial diary items for your managed properties that are not completed.
4. Click **Sync**.
  5. A message will display summarising the diary items that have been sent to your Outlook Calendar.  
**Note:** Outlook Sync will not automatically Sync, it will only sync when this is done manually by the user.

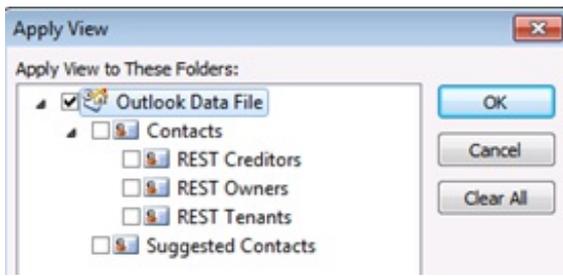
When a diary item is completed or deleted in Rest, with the next synchronisation the diary items will be removed from your Outlook Calendar.

## Troubleshooting Guide

### My Contacts aren't displayed in MS Outlook 2010 after synchronisation

The view in Outlook Contacts may need to be refreshed to show the new Rest Contact folders, in MS Outlook 2010

1. In Contacts, Select the **View** Tab
2. Click **Change View > Apply Current View to Other Contact Folders**.
3. Expand the Contacts folder by selecting the arrow and select the Rest folders from the list.
4. Click **OK**.



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