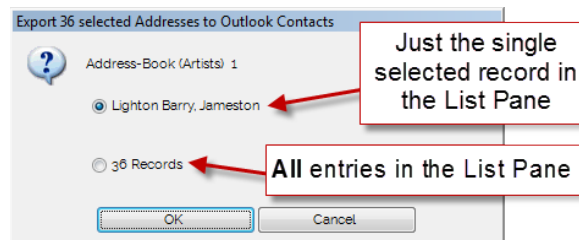
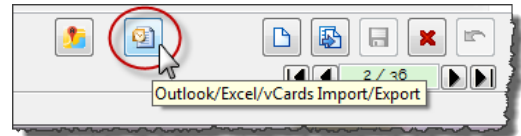


## Outlook Address Book Integration

Entries in the OPAS **Address Book** can be dragged-and-dropped to and from **Microsoft Outlook**. Before utilizing this function, you must properly configure the different types of contact numbers in OPAS so that they appear in the proper field in Outlook (see the end of this document).

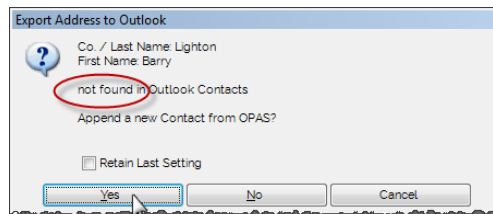
**Export from OPAS to Outlook** To send an OPAS **Address Book** entry (or set of entries) to Outlook, click the **Outlook Export/Import** button in the bottom border of the screen:



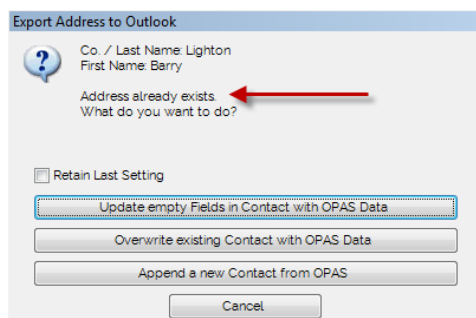
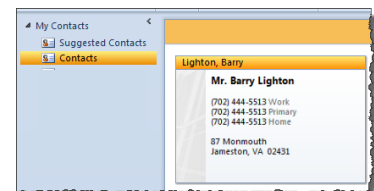
OPAS will display a prompt confirming the number of **Address Book** entries to be sent to Outlook. Choose the top option to export the one record selected in the List Pane (and also loaded into the top Details Pane). Choose the bottom option to export **ALL** records in the List Pane.

OPAS will search your Outlook contacts to see if the person/people is already in Outlook.

If the person **is not already in Outlook**, OPAS will display this prompt:



Click **Yes** and OPAS will transfer the entry from the OPAS Address Book to your Outlook contacts



If the Contact already **exists in Outlook** you will see the window at right with the following options:

The first button will only send OPAS information in the Name, Address, Phone, Email and Web fields that **does not already exist** in Outlook. Information will be added only, not over-written

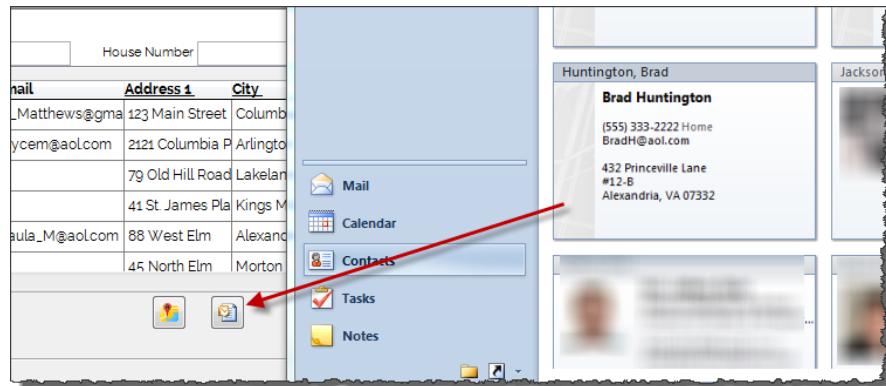
The second button will **fill in blank data and will overwrite** Name, Address, Phone, Email and Web fields that exist in OPAS. Information will be added *and* overwritten (updated)

The third button will **create a new** (possibly duplicate) record in Outlook

**Import from Outlook to OPAS**

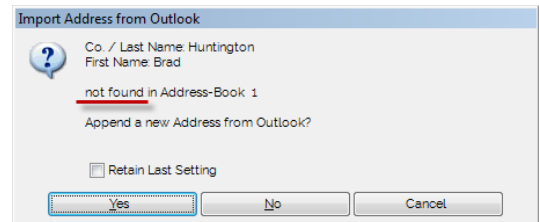
To import a contact from Outlook, first open the OPAS **Address Book** to which the person will be imported (**Address Book (Artists)** or **Address Book (General)**).

Click the Contact's card or entry in Outlook, drag it to the OPAS **Address Book** and release it over the **Import/Export button**. You may need to position your Outlook window next to, or on top of, your OPAS window -



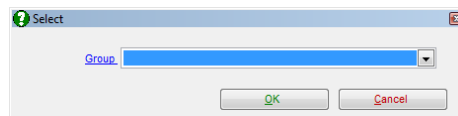
OPAS will search your OPAS Address Book to see if the person is already in OPAS.

If the person **is not already in OPAS**, you will see this prompt:

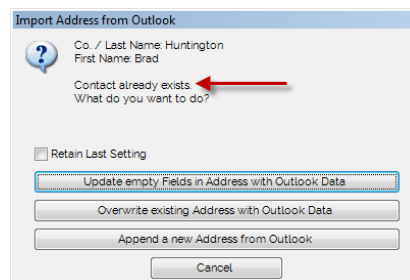


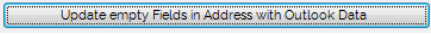
Click **Yes** to add this person or business to OPAS.

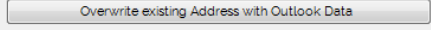
Because Outlook does not use Address Groups or categories to the degree that OPAS does you must next assign the Address Group for this entity:

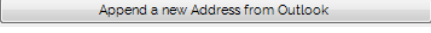


If the person or company is already in OPAS, the prompt will be as shown here and present three option:



 Select the first option to have OPAS only import data from Outlook that does not yet exist in OPAS

 Select the second option and *all* Outlook information will be imported and where applicable will overwrite data in OPAS. In other words, phone numbers and address data will be deleted in OPAS and replaced with that from Outlook.

 Select the third option to have OPAS create an entirely new entry – the existing **Address Book** entry that triggered the message will not be touched.

## Configuring the OPAS / Outlook Integration

Before you can drag/drop contracts from Outlook to OPAS, the feature must be turned on, and Contact Numbers properly configured. Both actions need to be taken only once.

Set the  
OPAS.INI file

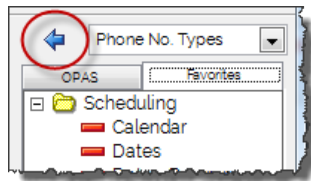
```
CheckDateOverappings with Other Levels=NO  
LoginLog=ON  
OUTLOOK=ON  
LoadWorksNotes2Program=YES  
ErrorLog=OFF  
EnableReminders=YES  
ReminderInterval=5  
SaveToRelatedDates_KeepLevel=YES  
SaveToRelatedDuties_KeepLevel=YES  
OUTLOOK_ImportNumberText=NO  
  
.....  
[DATADISPLAY]
```

Open the OPAS.INI file, found in the main OPAS directory on the server (if you double-click the file, it will automatically open in Notepad).

Scroll down to the [SYSTEMSETTING] section and ensure the highlighted lines are set as shown here. Save the OPAS.INI file and exit.

Setting Contact  
Number types

Phone Numbers in OPAS must also be configured to properly integrate with Outlook.



Select **Phone No. Types** from the list of program areas in the far upper right-hand corner of OPAS.

For each contact number classification, check the appropriate box to facilitate imports and exports with Outlook as shown below. Note that if you check *both* the Home and Work options for both Telephone and Fax

numbers, OPAS will place the phone number in both fields in Outlook. Phone number types in OPAS that are not configured (no check boxes) will not be imported from nor exported to Outlook.

These check boxes map the phone number type to Outlook