

# MS Outlook Integration with 1-Step Software

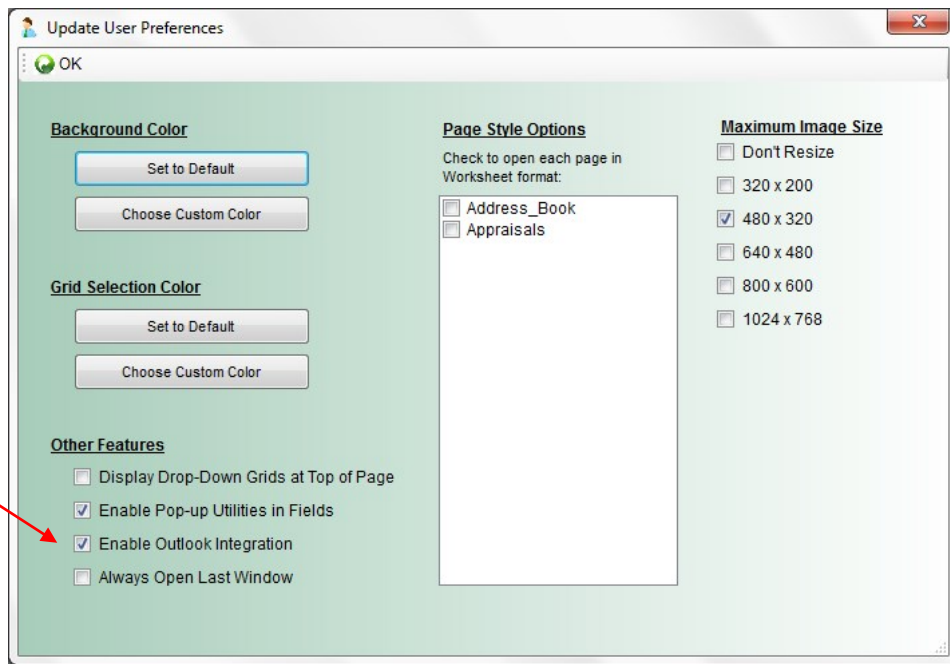
## User Guide / Supplement

All 1-Step Software products integrate with Windows desktop versions of Microsoft Outlook to support email and remote replication features. The supported versions of Outlook are: Windows Outlook 2000, 2002, 2003, 2007, 2010, 2012 or Outlook 365 (32-bit version ONLY; 64-bit NOT supported).

*Please note that Outlook Express and the web versions of Outlook are NOT supported for integration with 1-Step Software products.*

To tell your 1-Step Software product that you want to use Outlook, click on the Main Menu button, then click on "User Preferences" to open the preferences dialog.

In the "Other Features" section, check the "Enable Outlook Integration" option.

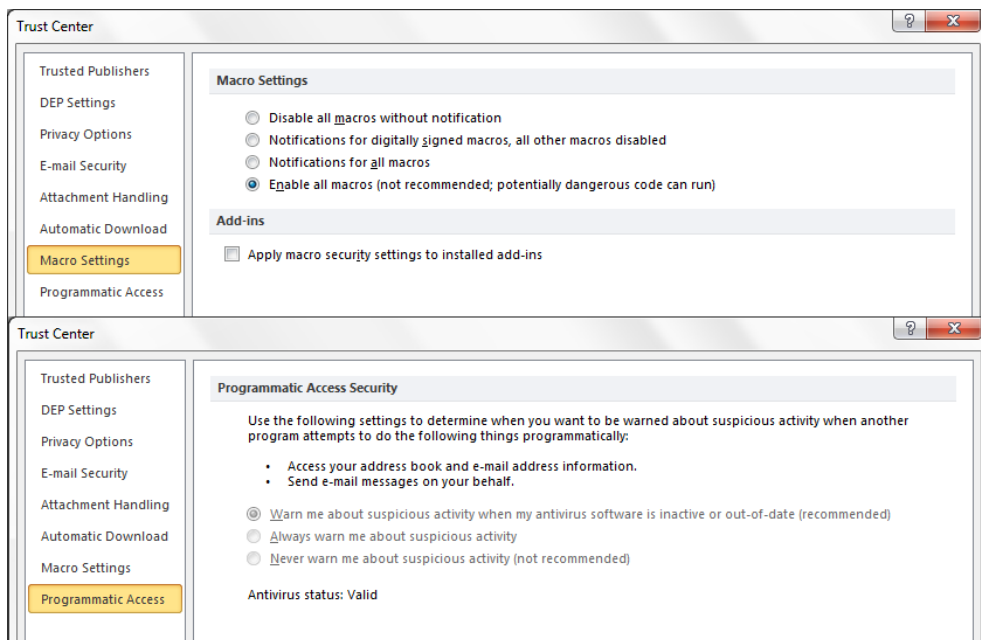


You will also need to check some settings in Outlook to let it work with 1-Step Software. Open Outlook, then access the "Trust Center" settings. In Outlook 2007 and above, click on the "File, Options" icons and then on "Trust Center".

Click on "Macro Settings" and then on the "Enable all macros..." option.

Click on the "Programmatic Access" option and select the "Warn me about suspicious activity when my antivirus software\* is inactive or out-of-date...".

Click "OK" to apply your settings and close the Trust Center dialogs.



\*Please note that if you do NOT have an active anti-virus utility on your computer, you should add one as soon as possible to protect your system. A good one is Microsoft Security Essentials, which is a free utility that's unobtrusive and easy to maintain.

## Configuring Outlook for Remote Replication

(not available in all 1-Step Software products)

### Connecting Web-Based Email Accounts to Outlook

In order to use remote replication in our products, you **MUST** use one of the supported versions of Outlook with an email account that permits the replication packages (which are simply zipped attachments) to pass through to your desktop Outlook program.

Many companies manage their own email servers, such as Exchange Server, and may have security appliances or high security settings which, for one reason or another, do not allow the replication attachments to pass through to the client.

If you find that your business email address is not permitting replication packages through, you can sign up for and connect one of the email accounts below to Outlook to manage the replication and email utilities.

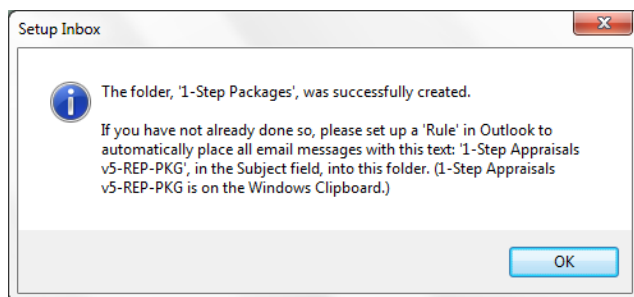
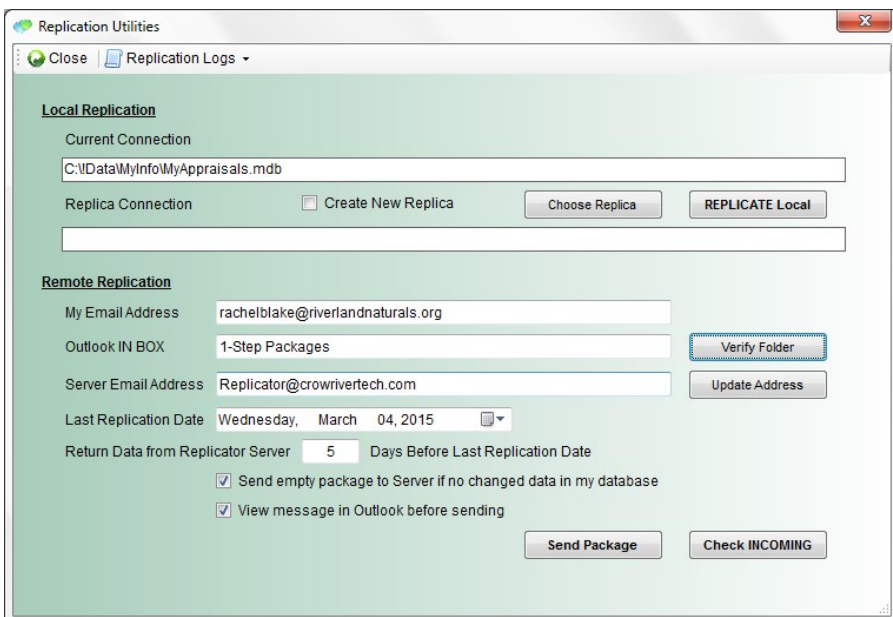
Each email provider has its own Outlook Setup instructions for connecting to Outlook. You can find online instructions for connecting your web email account to Outlook by searching the help files for that provider or by a generic internet search on topics like “connect Outlook.com to Outlook 2010”, or “connect gMail account to Outlook 2007”.

### Remote Replication Setup

1-Step Software looks in your Outlook Inbox each time the user clicks the “Incoming Package” button on the Remote Replication tab. Since many users may have dozens or even hundreds of emails uncategorized and left in their Inbox, this can take more time than necessary to search through all of those emails for a replication package. To reduce the time, you can setup a new folder in Outlook, then apply a “Rule” to automatically move incoming emails to that folder.

1-Step Software can create and store the name of the Incoming Packages folder by following these steps:

- ◆ On the Main Menu, click on the “Client Replication” option to open the replication settings and utilities.
- ◆ Your current database path will be displayed under the Local Replication settings.
- ◆ Your email address will be displayed as it’s defined in your Security record. If you are a new, remote user and do not have a replica of your production database, enter your email address as advised by your System Administrator.
- ◆ Enter a name for the folder in Outlook where your incoming packages will be collected, then click the “Verify Folder” button. The folder will be created at the same level as your Inbox. You should get a prompt (right) that tells you it was successfully created with instructions for setting up a rule in Outlook to automatically move emails to that folder. NOTE: the Subject text has been copied to your Windows clipboard.



## Configuring Outlook for Remote Replication

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### Setting Up A Rule In Outlook to Move Replication Packages to the Tasks Folder

After clicking the 'Verify Folder' button to create or verify the "Outlook Inbox" folder, a message will follow, reminding you to setup a rule in Outlook for using this folder, and it will copy to the Windows clipboard the text you will need in the Step 2 below.

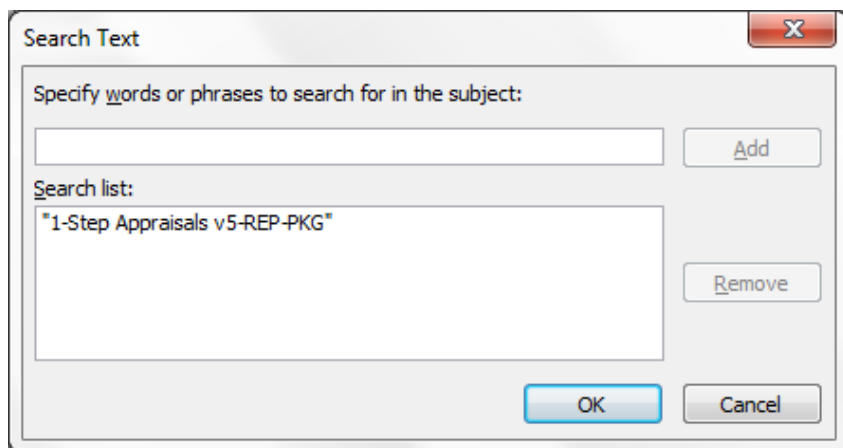
Open Outlook and choose **Tools, Rules & Alerts, New Rule** from the Outlook menu, then follow the steps on the dialog:

#### Step 1 - Select a template

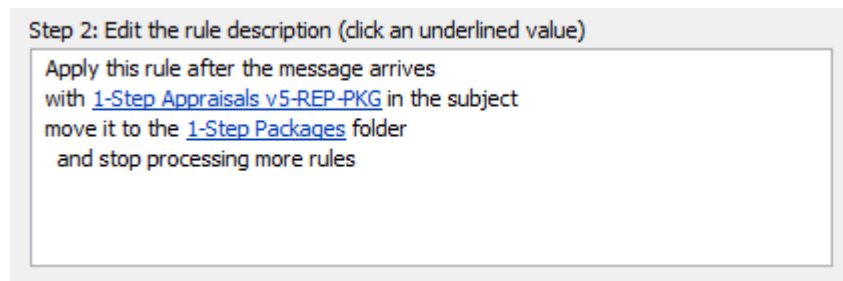
Choose to 'Move messages with specific words in the subject to a folder'.

#### Step 2 - Edit the description (click an underlined value)

Click on the 'specific words' link and use Ctrl+V to paste the words from the windows clipboard. Click 'Add' and 'OK' to close the dialog.



Then click on the 'specified' (folder) link and choose the new folder. The results should look like this:



When a replication package is sent to the user, it will now automatically move into the specified folder.

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All user guides are available for download on our support site at [www.1-StepSoftware.com](http://www.1-StepSoftware.com).

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