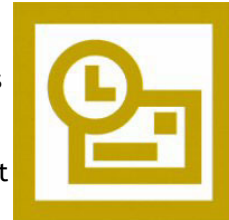


Sync your schedule and work orders with SME & Microsoft Outlook

High 5 Software is proud to announce a new addition to the SME product family to keep your sales staff and technicians in synch with SME and Microsoft Outlook. The new Outlook Sync upgrade easily links your schedules and activities between the two programs.



The Outlook sync can be installed on an Outlook system either with Microsoft exchange or stand-alone. The sync process is automatic based on the users setting allow user's activities and order schedules to seamlessly send from SME to the user's Outlook account. Here is a list of features you will receive from synchronization between Outlook and SME:

- Transfer SME activities and callbacks to Outlook task items
- Transfer labor item schedules to your Outlook calendar
- Implementation as a standalone feature or in an Exchange server system
- Outlook sync runs on the user's Outlook program and is licensed on a per Outlook user basis

If you would like to find out more information give us a call at (800) 585-1696 or send an email to sales@high5software.com.

Download your 30-day trial copy now: <http://www.high5software.com/downloads/outlook/>

SME Setup Instructions:

- 1) For activities setup the user Email that you want to sync.
 - a. Open SME
 - b. Select Setup>Users
 - c. Make sure you have the proper email setup for the user you want to sync activities with Outlook tasks. See example below for marks@high5software.com

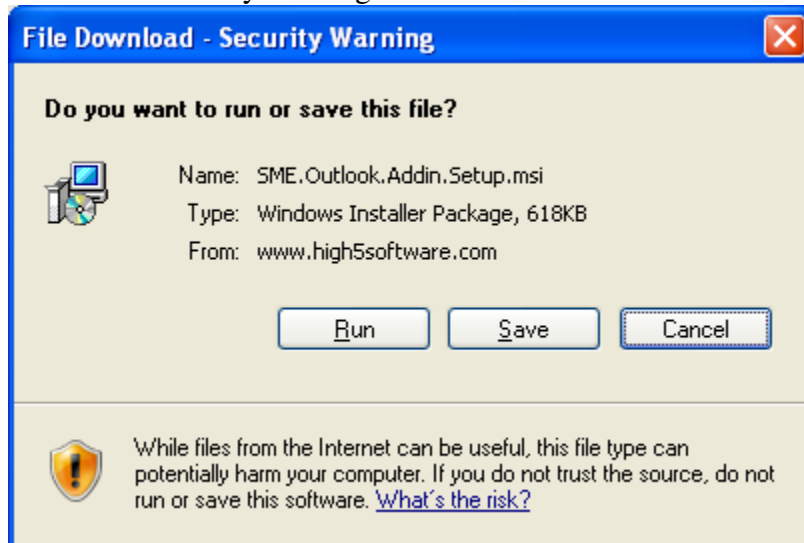
Inventory	Name	Mark Stair	Log In Name	MarkStair
Assets	Address		Password	*****
Help Desk	City, State Zip		Employee ID	
Doc Center	Phone	() -	Position	
Utilities	Cell Phone	() -	Email	marks@high5software.com
Setup	Pager	() -	Personal Email	
Company	User Group	Admin Group	<input checked="" type="checkbox"/> Is Salesperson	<input checked="" type="checkbox"/> Is Active
Technicians	Commission Rate			20.0%
Users				

- 2) For technician schedules, setup the Email you want to sync
 - a. Open SME
 - b. Select Setup>Technicians
 - c. Make sure you have the proper email setup for the technician you want to sync schedules with Outlook calendar items. See example below for technician marks@high5software.com

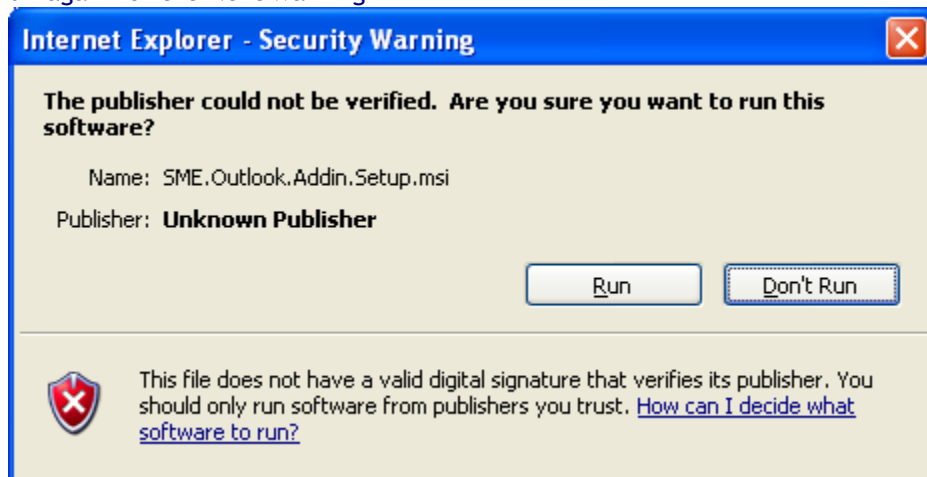
d.

Outlook Sync Installation

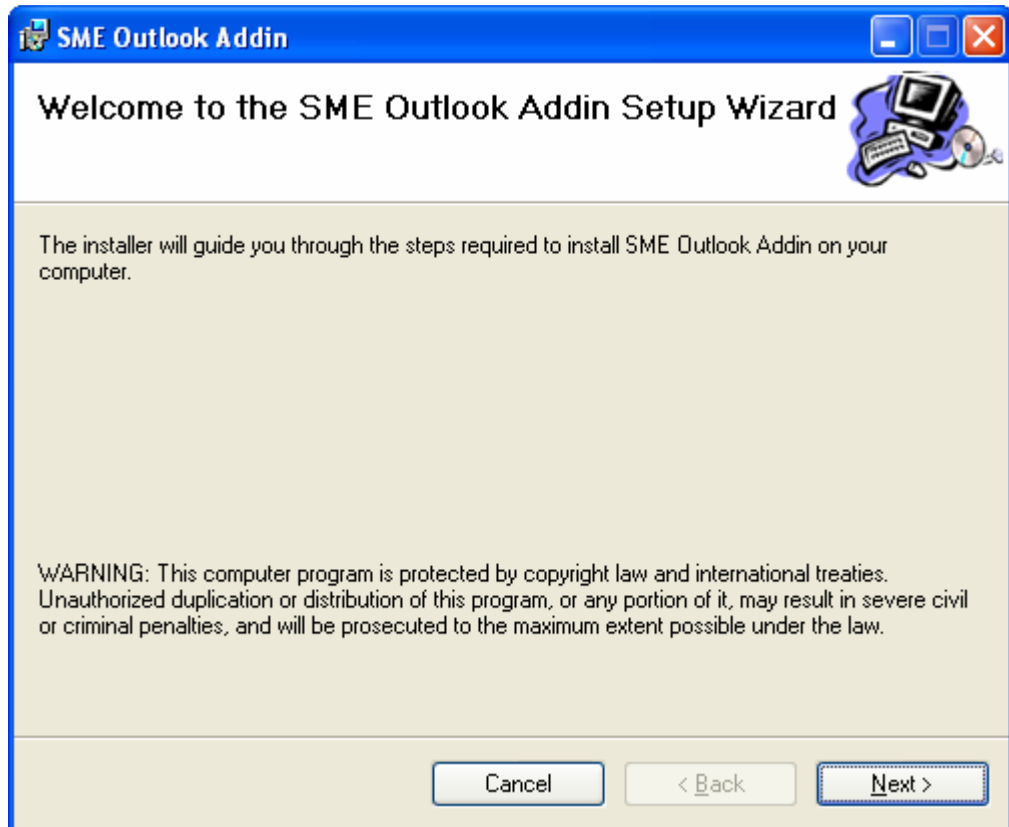
- 1) Download the Outlook sync from <http://www.high5software.com/downloads/outlook/>
- 2) Select Download button
- 3) Select Run for the Security warning



- 4) Select Run again for the Next warning

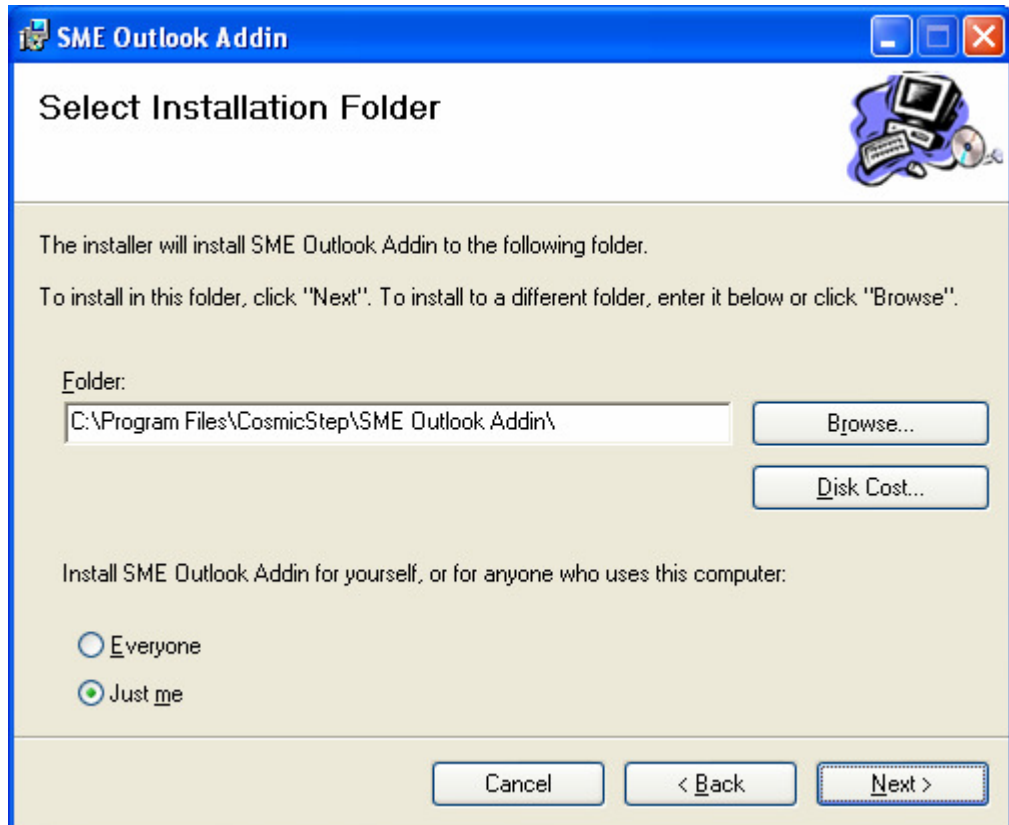


- 5) Select Next for the first screen



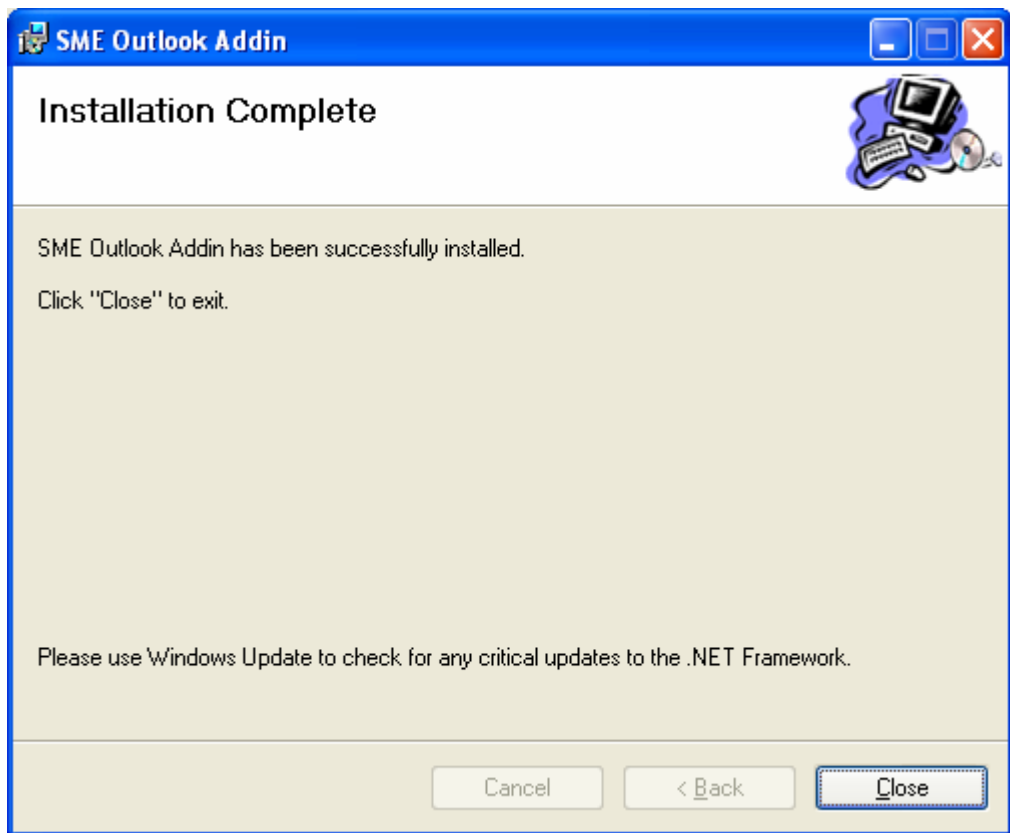
a.

- 6) Select your folder location and decide if the install is for you or all users on your computer. Select Next>



a.

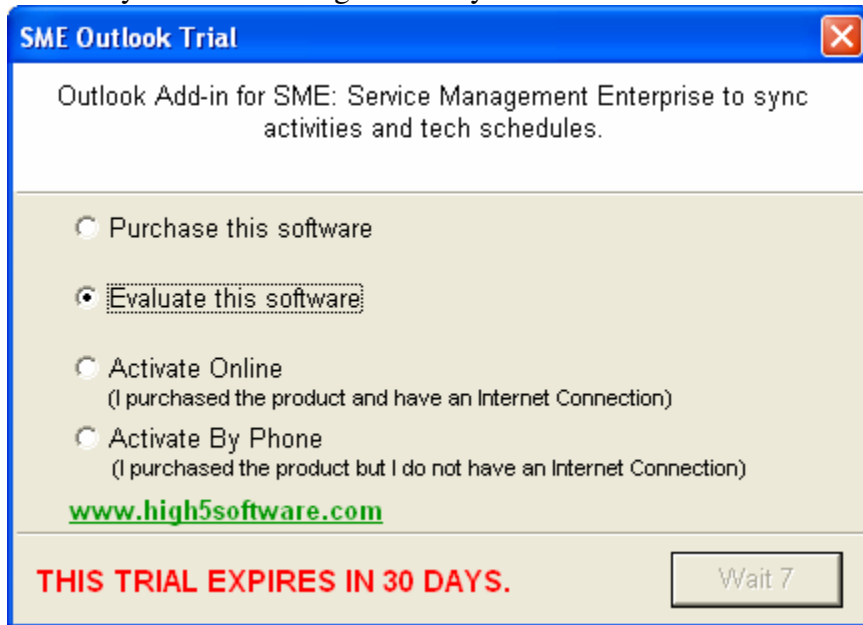
- 7) Confirm Installation, Select Next>
8) When installation is complete, select Close



a.

Outlook Sync Setup

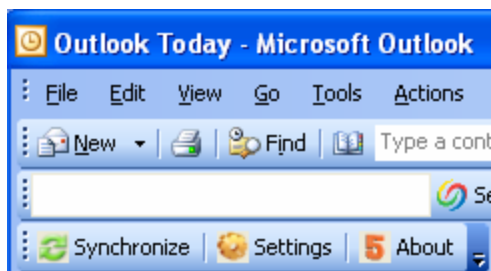
1) When Outlook sync starts it will give 30-days evaluation



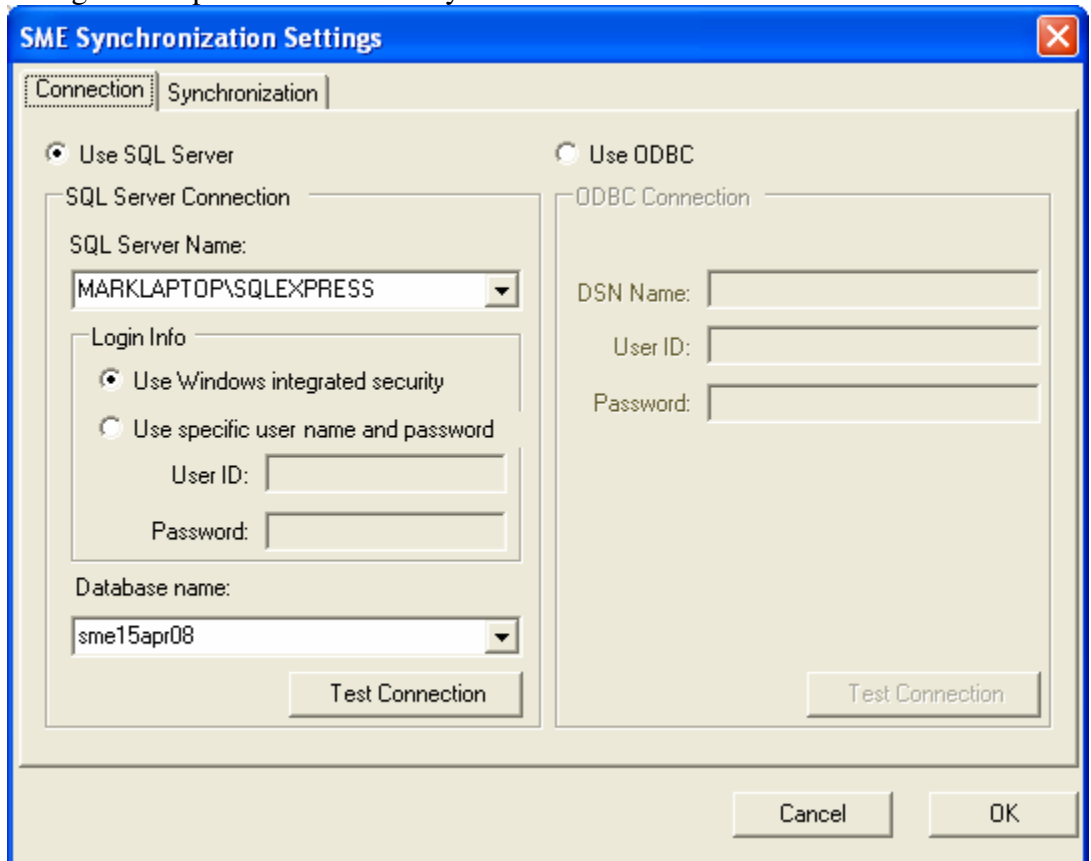
a.

- b. Select “Evaluate this software” to utilize your 30-day trial
- c. Select “Purchase this software” to immediately purchase and license your software.
- d. Select “Activate Online” if you have already purchase and want to active online.
- e. Select “Activate by Phone” if you have purchased and do not have an internet connection. (Not recommended).

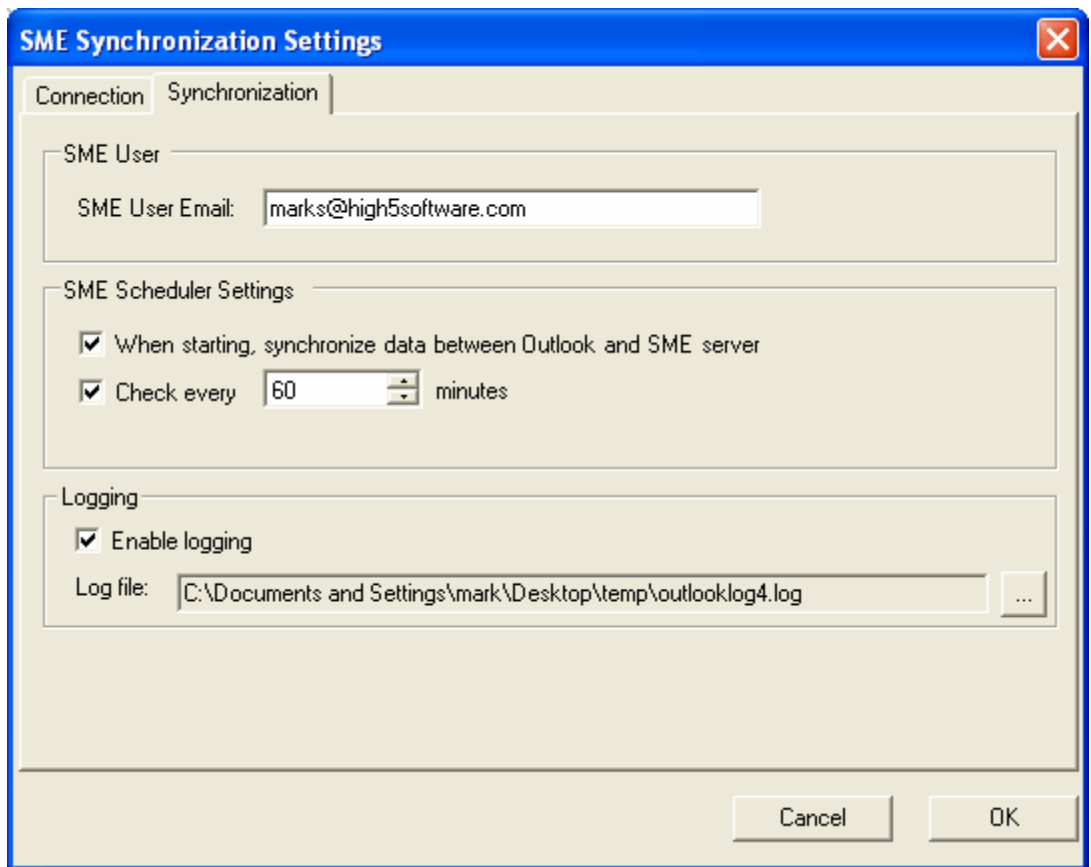
2) You will notice new options for Outlook: Synchronize, Settings and About.



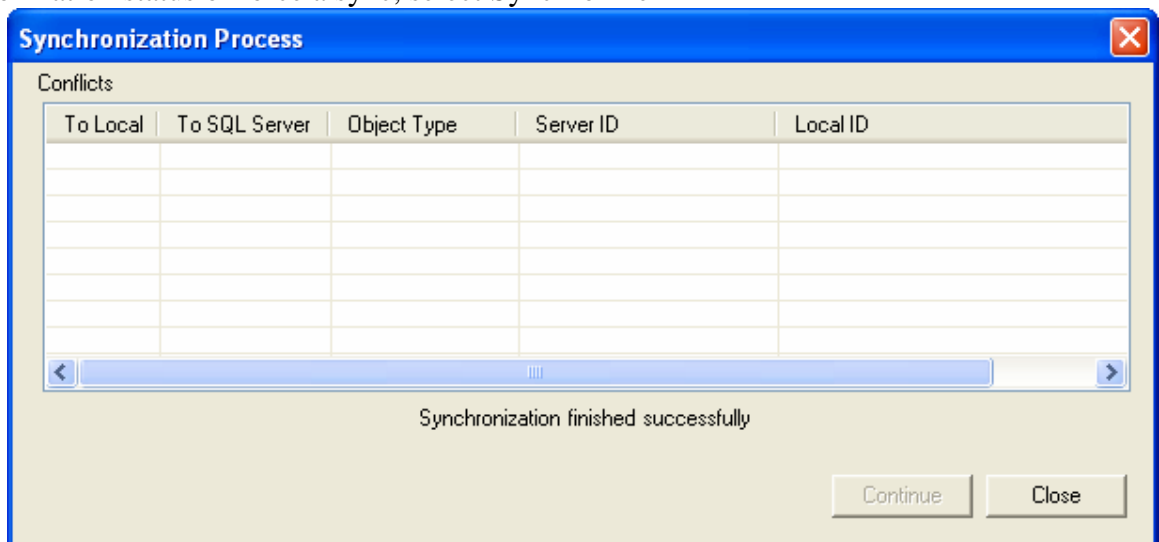
- a.
- 3) Select Settings to setup the connection to your SME



- a.
- b. Select SQL Server (preferred) type connection or ODBC connection
- c. If you are not sure, please check with your system administrator.
- d. For “Use SQL Server”:
- Select the SQL Server Name
 - Select the login method
 - Select the Database name. You will have to type in the database name same as your SME setup.
- e. For “Use ODBC”. You will get the following information from your system administrator:
- Select the DSN name
 - Select the User ID
 - Select the Password
- f. Select Test Connection to make sure that the connection is good.
- g. Select Synchronization Tab



- h.
 - i. Select the SME User that you set in the SME setup above.
 - j. Select “When starting...” option to sync when you first start
 - k. Provide a setting to check every XX minutes. Recommend 60 minutes.
 - l. Select Enable logging if you want to log any errors and provide a directory and file name.
 - m. Select Ok when your settings are complete
- 4) Outlook will automatically sync with SME. If you want to check the synchronization status or force a sync, select Synchronize

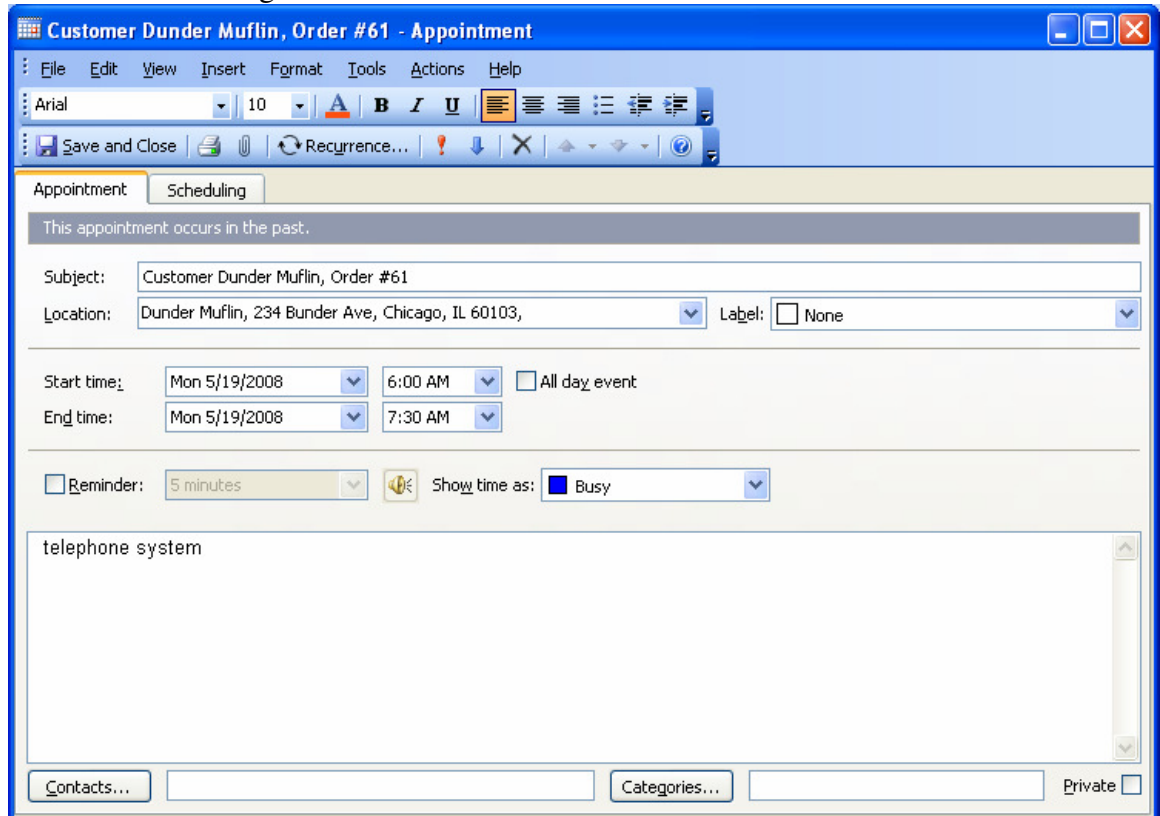


- a.
- b. If it is unable to connect to SME or if there are any conflicts in the sync it will be shown here.
- c. To resolve conflicts select either “To Local” or “To SQL Server” (to SME) and continue to resolve the conflict.

Outlook Sync Operation with SME:

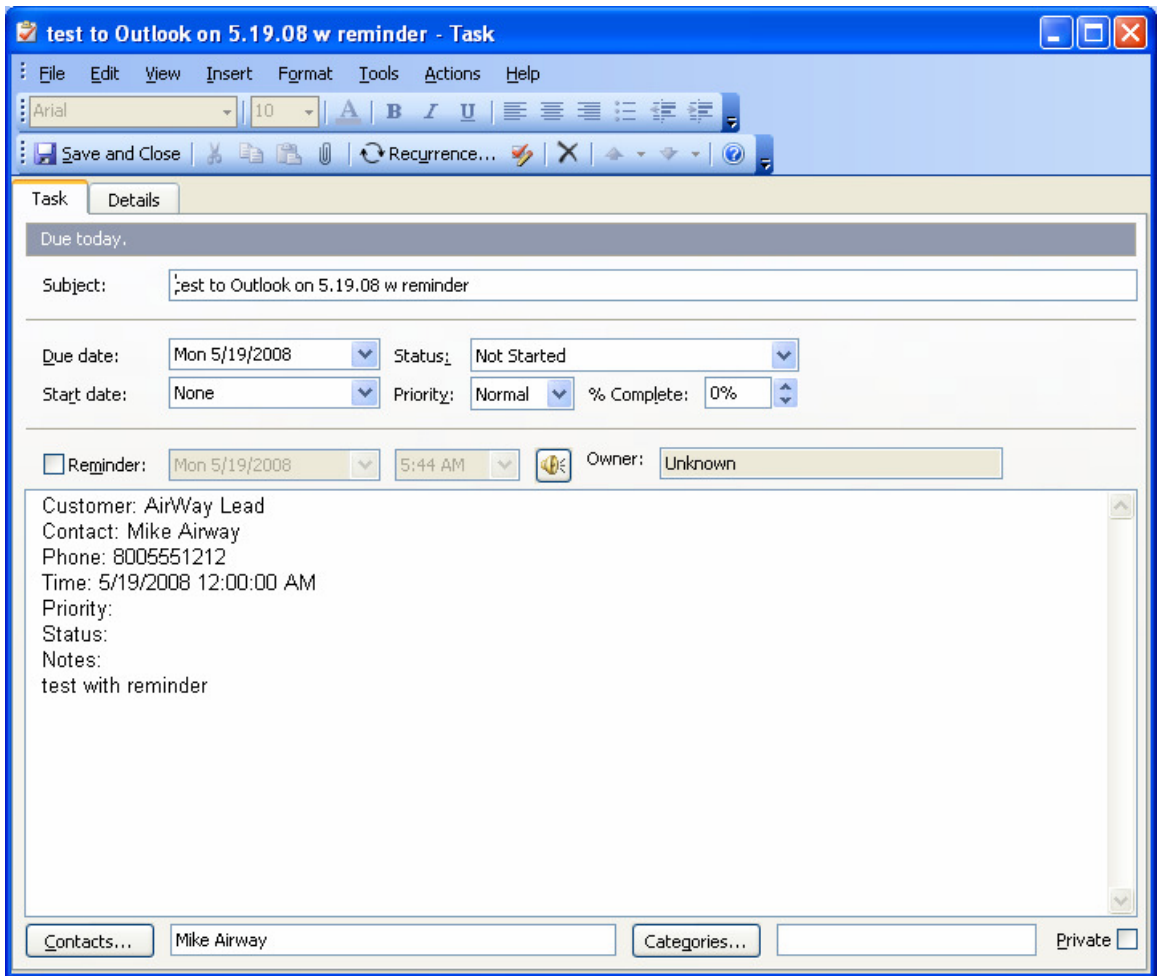
1) Technician Schedules

- a. When labor items are added for this user they will immediately be set to sync with Outlook.
 - i. **NOTE: The SME order does NOT have to be saved in order to sync with Outlook, it will be ready to sync as soon as the labor item is created and select ok.**
- b. When the schedule goes into Outlook it will look like this:



- c.
- d. The Subject contains the Customer and order number.
- e. Orders can come from Service Orders, Install Orders, or Itemized Invoices
- f. The location field will be the Customer and site address
- g. The start date and time will match the labor item in SME
- h. The text area will contain the Service Requested Text.
- i. NOTES and Limitations:
 - i. Data syncs from SME to Outlook. Changes to the appointment in Outlook will NOT sync back to SME.
 - ii. Date or time schedule changes made in SME will change in Outlook
 - iii. Service Request changes in the order will NOT sync back into Outlook
 - iv. Labor items that are deleted or changed to another tech in SME will NOT update in Outlook.

2) Activities and Call backs:



a.

5 Activities Editor

Company: AirWay Lead

Contact: Mike Airway

Phone: (800) 555-1212 State: WA

Reason: test to Outlook on 5.19.08 w reminder

Assigned To: Mark

Date: 5/19/2008 Time: 05:44 AM

Set Reminder to Activity Date and Time

Priority: 0 Complete

Status:

Notes: test with reminder

Update Last Action For Company

- b.
- c. **NOTES and Limitations:**
- i. Data syncs from SME to Outlook. Changes to the task in Outlook will NOT sync back to SME.
 - ii. Date or time schedule changes made in SME activities will change in Outlook
 - iii. Notes changes in the activity will NOT sync back into Outlook
 - iv. Activities deleted or changed to another user in SME will NOT update in Outlook.