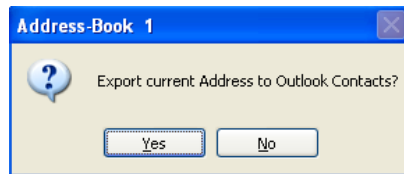
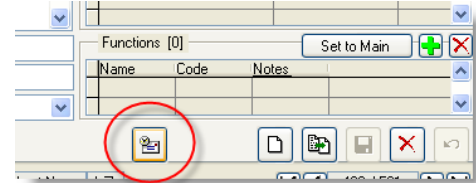


## Outlook Address Book Integration

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

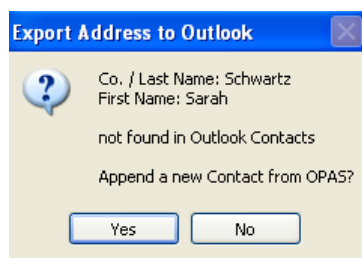
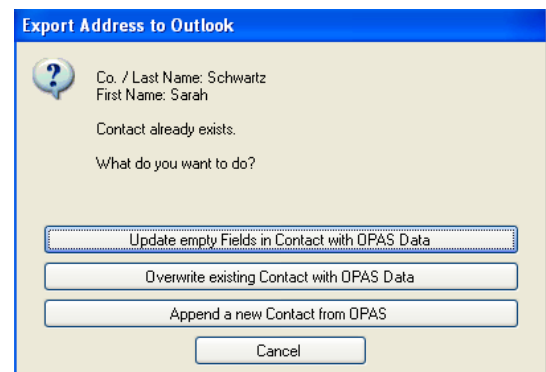
To send an OPAS **Address Book** entry (or set of entries) to Outlook, click the **Outlook Export/Import** button at the bottom right of the **Main** or **List** screen:



OPAS will display a prompt confirming the export, and clicking **Yes** will execute the data transfer.

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

1. 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
2. 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)
3. The third button will **create a new** (possibly duplicate) record in Outlook

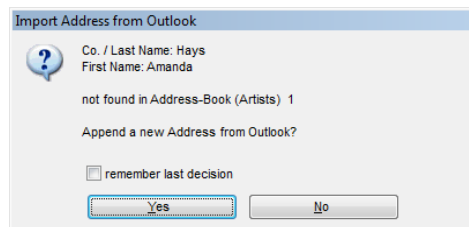
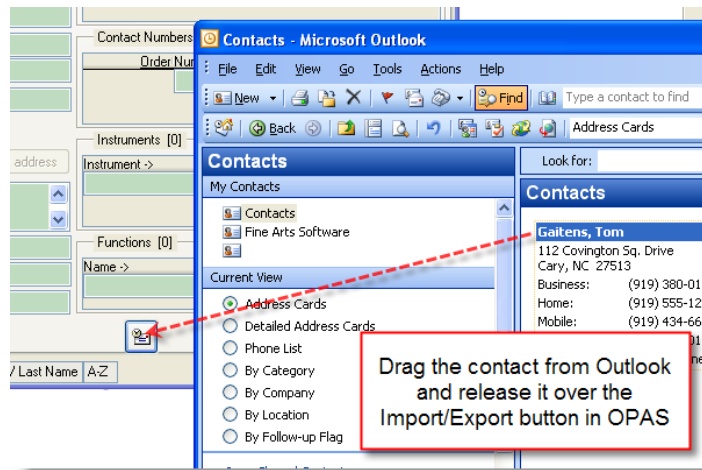


If the Contact **does not yet exist** in Outlook, you will see this prompt and clicking **Yes** will create a new Outlook contact with the information from OPAS.

### Import from Outlook to OPAS

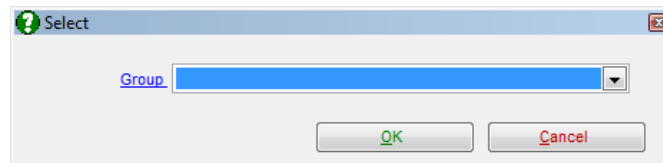
To import a contact from Outlook, first open the OPAS **Address Book** to which the person will be imported (**Address Book (Artists)** or **Address Book (General)**).

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 -



When you release your mouse in OPAS, it will display a message indicating if the entity already exists in OPAS: 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:



## 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

```

CheckDateOverlappingsWithOtherLevels=NO
LoginLog=ON
OUTLOOK=ON
LoadWorksNotes2Program=YES
ErrorLog=OFF
EnableReminders=YES
ReminderInterval=5
SaveToRelatedDates_KeepLevel=YES
SaveToRelatedDuties_KeepLevel=YES
OUTLOOK_ImportNumberText=NO
;*****
[DATADISPLAY]

```

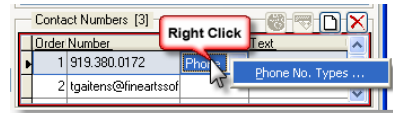
Open the OPAS.INI file, found in the main OPAS directory on the server (if you double-click the file, it will automatically open in Notepad).

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

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

- Click the Background Data 1 | Phone No. Types menu item at the top of the OPAS screen, or **right** click a phone number in the Address Book and select Phone No. Types.
- On the **Main** screen 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.



Phone numbers in the Address Book must be properly configured to integrate with Outlook.

This OPAS setting	Corresponds to this Outlook number