# Outlook Integration Guide

Tabs3 Billing

PracticeMaster

Trust Accounting

Accounts Payable

General Ledger

# PracticeMaster Outlook Integration Guide

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# *Purpose of Guide*

PracticeMaster has the ability to synchronize calendar and contact records with Outlook. Records added in PracticeMaster can synchronize to Outlook; likewise, records added in Outlook can synchronize to PracticeMaster. This powerful integration is primarily maintenance-free once set up.

PracticeMaster stores all of your client and case information. Integrating your PracticeMaster contacts and calendar with Outlook makes it easy for you to take your current calendar and contact list with you in Outlook, as well as synchronize it to your smartphone.

This document includes all of the information you need to use this feature. It introduces you to integration, discusses how to get started, provides examples, and discusses how using Microsoft Exchange affects integration.

 Additional guides for separate software features are also available.

All guides are available on our website at:

### *Tabs3.com/support/docs.html*


# Knowledge Base

You may be referred to additional detailed information located in our Knowledge Base at:

### *support.Tabs3.com*

# *Basic Concepts*

Both PracticeMaster and Outlook include calendar and contact features. However, one of the biggest advantages PracticeMaster has over Outlook is the ability to link contacts and calendar records with clients. Let's take a look at the overall concepts of how this works.

**PracticeMaster & Outlook:** PracticeMaster contacts can synchronize with Outlook contacts. PracticeMaster also allows you to create calendar records and assign them to your clients and contacts. These calendar records can synchronize with Outlook appointments and tasks. This integration occurs automatically when new records are *added* or *changed* in either system. However, contact deletions must be processed in PracticeMaster. This prevents accidental deletion of contacts that are used in other areas of Tabs3 Software (e.g., client, contact, vendor, payee, user, etc). Calendar record deletions in Outlook can be optionally configured to synchronize to PracticeMaster.

**Clients & Contacts:** If you add a client or contact in any Tabs3 Software application, the contact information is synchronized to Outlook via PracticeMaster. Conversely, if you add a contact in Outlook, it is automatically synchronized to PracticeMaster as a contact. Contacts can easily be assigned a client ID in either PracticeMaster or Tabs3 Billing.

### *Tabs3 Billing/PracticeMaster Contacts & Clients → Outlook Contacts*

### *Outlook Contacts → PracticeMaster/Tabs3 Billing Contacts*

**Calendar:** PracticeMaster calendar records synchronize with Outlook calendar records. If you add a calendar record in PracticeMaster, it is synchronized to Outlook. Likewise, if you add a calendar record in Outlook, it is automatically synchronized to PracticeMaster.

### *PracticeMaster Calendar Record → Outlook Calendar Record*

### *Outlook Calendar Record → PracticeMaster Calendar Record*

**Outlook Calendars & Folders:** The following concepts are important to remember:

- Each PracticeMaster user can synchronize to only one Outlook calendar.
- In an Exchange environment, multiple users cannot synchronize to the same Outlook calendar.
- In an Exchange environment, multiple PracticeMaster users can synchronize to a shared contact folder.

# Terminology Differences

There are some differences in calendar terminology between PracticeMaster and Outlook.

- Outlook Appointments = PracticeMaster Events
- Outlook Tasks = PracticeMaster Tasks
- Outlook Events (24-hour appointment or multi-day appointment) = PracticeMaster Events
- Outlook Reminders = PracticeMaster Alarms

# Synchronization Types

There are three types of synchronization: Automatic, Periodic, and Manual.

## *Automatic*

When configured for automatic synchronization, records synchronize to each application as they are added in PracticeMaster or Outlook. Changes and deletions are also synchronized. Although automatic synchronization handles the great majority of record synchronizations, there are a few limitations. Records that do not synchronize automatically are handled by periodic synchronization.

**Calendar vs. Contact Records:** In an Exchange environment, it is possible for calendar records to be synchronized for other users automatically, depending on the configuration. However, unless you are using a shared contact folder, contact records will only be synchronized for other users during a manual or periodic synchronization.

> **Note:** Calendar records that have been automatically synchronized to PracticeMaster are present in the calendar once the synchronization is complete. However, they will not be shown on the PracticeMaster visual calendar until the next time it is refreshed or reopened. You can manually refresh the visual calendar by pressing F5 or by clicking the button. You can modify the refresh interval by modifying the **Number of minutes to wait between refreshes** field on the **General** tab of the Calendar Properties window.

## *Periodic*

Periodic synchronization supplements automatic synchronization by performing a full synchronization of all records that meet the current synchronization criteria for a specific

user. This synchronization ensures that all users' records are kept up to date, especially for users who are not using Microsoft Exchange. The periodic synchronization essentially compensates for the limitations of the automatic synchronization. It may be helpful to think of the periodic synchronization as a recurring "sweep-up" synchronization, where it does a "catch-up" pass to pick up any records that didn't get synchronized during automatic synchronization.

Periodic synchronization occurs whenever PracticeMaster is launched, as well as at a user-specified interval (the minimum interval is 15 minutes). Only records that meet the current synchronization criteria for a user are synchronized. This means that records that are selected to sync during Joe's periodic sync can be different from the records that are selected to sync during Paula's periodic sync.

The following includes a list of records that a periodic synchronization will synchronize:

- Records that were added in Outlook when PracticeMaster is closed. *(Note: When using the Exchange Connector, these records are synchronized automatically.)*

- Contact records that were added by another user in PracticeMaster.

- Contact records that were added or modified in Tabs3 Billing.

- In a non-Exchange environment, calendar records that have been added by another user. *(Note: When properly configured in an Exchange environment, calendar records entered by another user are synchronized automatically.)*

- Any record that had not been previously synchronized (e.g., calendar records that were previously outside the specified date range).

- Records imported via the Import tool in File Maintenance, or imported by another user using the Import Data Wizard.

- Records permanently deleted in Outlook. *(Note: Calendar entries deleted in Outlook are treated differently based on whether they are deleted using the Delete key or permanently deleted using Shift+Delete. Calendar records deleted in Outlook using the Delete key without the Shift key can be seen in the Deleted Records folder; these deletions are automatically synchronized to PracticeMaster. However, calendar records that are deleted using Shift+Delete are considered permanently deleted. These records bypass the Deleted Records folder and therefore cannot be synchronized automatically, but are picked up by the periodic synchronization.)*

- Records added or modified in Tabs3 Connect. *(Note: When using the Microsoft 365 Exchange Connector, these records are synchronized automatically.)*

In summary, periodic synchronization will handle synchronization of records that cannot be synchronized automatically.

> **Note:** The behavior and configuration of the periodic synchronization feature changes significantly when the Exchange Connector is enabled in the Platinum software. See the **Platinum Exchange Connector Integration** section for more information regarding these differences.

## *Manual*

A manual synchronization occurs on demand. All records that meet the current synchronization criteria are synchronized. Although you can configure the software for manual synchronization, most firms are configured for automatic synchronization.

## *In Summary*

You can configure your synchronization method as Automatic or Manual. When using Automatic synchronization, you can also configure an interval for the Periodic synchronization. The following table summarizes differences between the synchronization types when synchronizing records for yourself:

|  | Automatic | Periodic | Manual |
|---|---|---|---|
| Synchronizes records that meet criteria | ✔ | ✔ | ✔ |
| Synchronizes records automatically upon entry *(provided PracticeMaster is open)* | ✔ |  |  |
| Occurs automatically | ✔ | ✔ |  |
| Occurs on demand |  |  | ✔ |

# *Configuring Synchronization*

Synchronization is configured primarily in PracticeMaster. Configuration for each user must be done at that user's workstation because these settings apply to the individual user. Each user is linked to a specific Outlook folder. Individual user settings are stored in the user profile. Microsoft Exchange settings are maintained in System Configuration because they are system-wide.

**Note:** If you are using the Microsoft 365 Exchange Connector, individual user settings can be configured from any workstation.

The individual user configuration in PracticeMaster is accessed from the Quick Launch by searching for and selecting "Outlook Synchronization." This opens the Outlook Synchronization window *(Figure 1)*, which consists of three tabs: **Calendar**, **Contacts** (Figure 2), and **Synchronization Options** *(Figure 4)*.

The following summarizes the information on each of these tabs. Detailed information for each option can be found in PracticeMaster Help.

# Calendar

The **Calendar** tab stores settings related to the synchronization of calendar records (events and tasks). Each user can synchronize calendar records with only one Outlook calendar folder.



*Figure 1, **Calendar** tab*

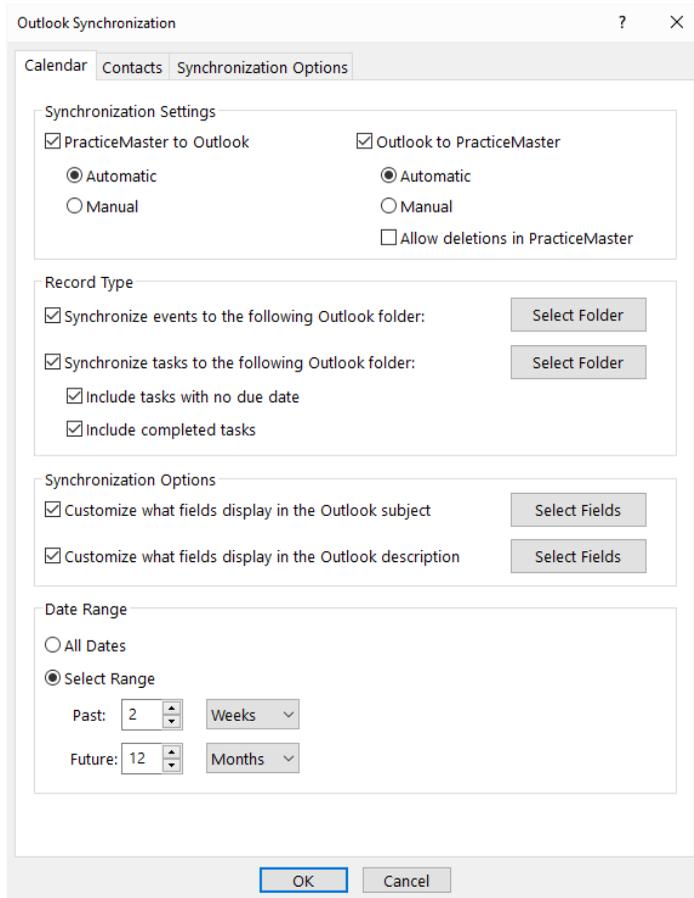- Use the Synchronization Settings to determine in which direction and how synchronization will occur.

- Use the Record Type settings to control which record types synchronize with Outlook, and to which Outlook folder records will be synchronized.

- Optionally use the Synchronization Options to control how PracticeMaster events and tasks will appear in the Subject and Description fields in Outlook.

- Use the Date Range filter to control which records are synchronized to and from Outlook by record date. Once a record falls into the configured date range, it will be synchronized between the two systems. Note that after a record falls out of the configured date range, updates will not be synchronized between the two systems.

> **Note:** If you are using the Microsoft 365 Exchange Connector, the date range cannot be longer than four years and the **All Dates** option cannot be selected.

# Contacts

The **Contacts** tab stores settings related to the synchronization of contact records.



*Figure 2, **Contacts** tab*

- Use the Synchronization Settings to determine in which direction and how synchronization will occur.

- Use the Synchronization Options to determine which Outlook Contact folder will be used for synchronization, and how the fields and categories in each system will be mapped to one another.

- Optionally use the User Filter to limit which contacts are synchronized to Outlook based on the users and groups assigned to them in PracticeMaster. This can be especially useful if you only want your contacts synchronized to your Outlook.
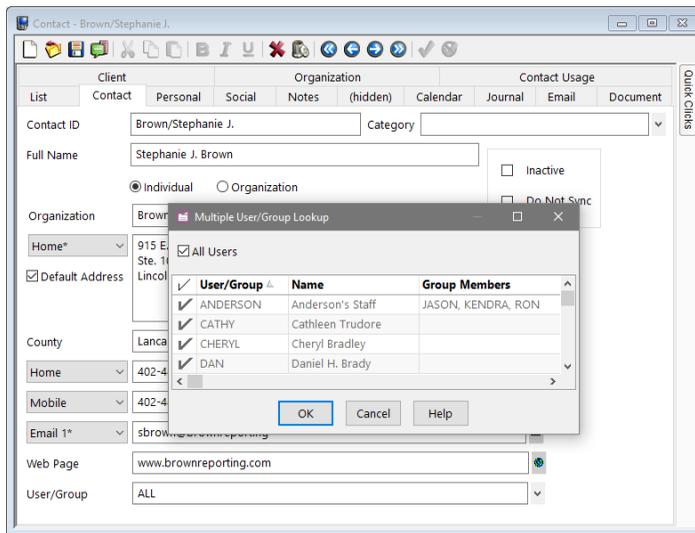


*Figure 3, Multiple User/Group Lookup window*

- Optionally use the Category Filter to limit which contacts are synchronized to and from Outlook based on the categories assigned to each contact.

- Optionally define Custom Filter criteria based on fields in the PracticeMaster Contact file.

- We recommend leaving the **Allow changes to billing contacts** check box cleared. This ensures that contacts assigned to a client in Tabs3 Billing can only be changed from Tabs3 Billing or PracticeMaster. For example, when this check box is selected, if a user edits the address of a billing contact in Outlook, that change will be applied to the client Tabs3 Billing, which could result in future statements being mailed to the wrong address.

# Synchronization Options

The **Synchronization Options** tab stores settings that apply to both calendar and contact synchronization.



*Figure 4, **Synchronization Options** tab*

Use the **Periodically run synchronization every XXXX minutes and on startup option** to configure a synchronization to run upon startup and at a set interval (default is 30 min.). A list of records that the periodic synchronization picks up can be found on page 9.

Keep in mind that a periodic synchronization occurs whenever a user starts PracticeMaster, and that most changes synchronize automatically when PracticeMaster is running. Therefore, there will not be many unsynchronized records that need to be picked up by subsequent periodic synchronizations during the session. Keep this in mind when setting the synchronization interval.

Configuring the interval of the periodic synchronization requires some consideration. Although you might think that you want to have the periodic synchronization run as often as possible, there are trade-offs to consider. Setting the number of minutes too low may cause unnecessary network traffic, thus affecting your network performance, especially when multiple users are synchronizing. Although the default value is 30 minutes, larger

firms may want to consider starting with a larger and more conservative value, such as 120 minutes. This is especially pertinent when working with larger data sets. For example, if you have 10,000 contact records that you synchronize, you want to make sure that the interval specified is greater than the actual amount of time to synchronize. Periodic synchronizations run in the background and it is easy to forget it is running. Although this is a good thing, it is important to realize that when a periodic synchronization is running in the background it does affect your network performance.

A common mistake is to set the interval as low as possible, not realizing that the benefit gained from a lower setting may not offset the slower performance. For example, with a 30 minute interval in a typical 9-hour day, the synchronization will run 18 times (9 hours x 2 syncs per hour). Multiply this by the number of users synchronizing. If there are 10 users synchronizing, do you want 180 synchronizations running throughout the day (18 syncs x 10 users)? It depends on how critical it is to have the most current information vs. how much it impacts your network performance. You have to find the right balance. Periodic synchronization requires fairly intensive CPU processing. Therefore, you will want to make sure you have idle time between synchronizations so that your system is not synchronizing all day long.

If another synchronization is running when a periodic synchronization starts, the periodic synchronization will be delayed until the other synchronization process completes.

> **Note:** The periodic synchronization option is disabled for individual users if the Exchange Connector is enabled. Periodic synchronization for the Exchange Connector is handled in System Configuration.

The **Require Confirmation when at least xx records will be synchronized** setting is used to set a threshold for when you want to see the Confirmation window. This setting can be used to stop the periodic and manual synchronizations when the specified number of records will be changed. You will then be required to confirm the changes before any future synchronization can occur. You can use this setting to make sure a large number of records are not mistakenly synchronized to one application or the other. As you become more familiar and comfortable with the synchronization, this setting can gradually rise. We recommend initially setting this value relatively low, and increasing it in small increments. We also recommend against disabling this feature. Keep in mind that when this setting is set at 1, the periodic/manual synchronization will be stopped every time any record needs to be synchronized.

The **Manual Synchronization** function can be used to perform a synchronization with Outlook on-demand. If you have configured Calendar or Contact synchronization as

Manual, records will only synchronize when this function is run. Also, if you are configured to use Microsoft Exchange (discussed later), you can use the User/Group lookup to synchronize other users' calendar records for them.

You can use the **Delete Records**function to delete any previously synchronized PracticeMaster records from Outlook. This function should only be used if the applications have become out of sync or if you want to purge Outlook of any PracticeMaster records. Also, if you are configured to use Microsoft Exchange *(discussed later)*, you can use the User/Group lookup to delete other users' calendar records for them.

# More Information on Configuration Options

Detailed information for each of the configuration options can be found in the PracticeMaster Help.

Knowledge Base Article **R11366**, "Configuring PracticeMaster/Microsoft Outlook Calendar & Contact Integration," includes additional screenshots of the various configuration windows.

# *Getting Started*

Whenever you implement synchronization with other systems, you must proceed carefully and consider the status of the data before you begin. Taking the extra time up front helps ensure a smooth transition. Whenever possible, it is easiest to start out with a clean slate in Outlook. However, when that is not possible, that is when you need to proceed carefully. If you are synchronizing Outlook with smartphones/handheld devices, you will also need to consider the status of that data.

## Best Practices

If you are integrating a mobile device (smartphone, tablet, etc.) with Outlook, see Knowledge Base Article **R11734**, "Integration between PracticeMaster and Mobile Devices through Outlook," for our recommended configurations.

As general guidelines, consider the following before starting to synchronize PracticeMaster with Outlook:

- Make a backup of PracticeMaster before starting.
- Make a backup of your Outlook PST file before starting. If you are using Exchange, back up the Exchange folder by copying it.
- Be aware that configuration must be done at each user's workstation, logged into their Windows user account and primary Outlook profile. However, when using the Microsoft 365 Exchange Connector, configuration can be performed from any workstation.
- Consider implementing synchronization for one user at a time.
- Consider synchronizing one way only to start as opposed to synchronizing both ways right away.
- Consider introducing contact synchronization separately from calendar synchronization.
- Verify results of previous synchronizations before adding additional synchronizations. For example, after synchronizing information for one user, verify that the information synchronized is correct before synchronizing information for the next user.
- Consider whether you want to allow users to make changes to Tabs3 Billing contacts from Outlook. While changing a contact's address information in Tabs3

Billing or PracticeMaster will notify you of any billing matters that will be affected by the change, Outlook has no way to perform such checks. Therefore, we recommend leaving the **Allow changes to billing contacts** check box cleared so as to prevent unintentional changes to where statements are sent.

- Consider whether you want your private contacts synchronized to PracticeMaster. All PracticeMaster users with rights to the Contact file can see all contacts. There is no concept of a private contact in PracticeMaster.

- Consider how you want to identify which contacts get synchronized with Outlook:

  - You can select the **Do Not Sync** check box in the PracticeMaster contact record; however, this affects all users that integrate with Outlook.

  - You can use the **User/Group** field in the contact record to identify a group and/or list of users with which the contact will integrate.

  - You can assign a category to the contact, and then include those categories using a category filter.

  - You can create a custom filter using the desired criteria to include the contact.

- Consider synchronizing with a new Outlook contact folder in order to keep your personal contacts separate from the practice management/billing contacts.

> **Note:** More information on limiting contact synchronization can be found in Knowledge Base Article **R11488**, "Controlling Which Contacts Synchronize Between Outlook and PracticeMaster."

- Contacts in Outlook can be accessed from the Outlook Address Book. Do not delete contacts via the Outlook Address Book. Deleting contacts directly from the Outlook Address Book only deletes the email and/or fax fields from the contact record, which will synchronize to PracticeMaster (and Tabs3 Billing) if you are configured to synchronize from Outlook to PracticeMaster and have **Allow changes to billing contacts** enabled.

- After synchronizing, you may end up with duplicate contacts. If this occurs, you can use the Merge Contacts utility in PracticeMaster after synchronization. This utility shows the contents of all fields in both records; you can easily view only the fields that are different. One advantage of using this utility is that all links in PracticeMaster are retained. After merging the information in PracticeMaster, the next synchronization will synchronize the remaining contact to Outlook and delete the additional contact from Outlook.

- Consider synchronizing a range of calendar entries instead of all calendar entries every time. The default is two weeks before the current date and 12 months in the future.

- Carefully consider the value of the periodic sync frequency and do not set it too low.

- Consider setting the confirmation threshold lower when first starting synchronization and gradually raising it.

- Consider asking questions before starting. Our Tabs3 Support Department will be happy to answer your questions.

- Consider the rights you want for Outlook Synchronization, including who will have access to change configuration options and execute a manual synchronization. The Access Profiles in System Configuration have separate access rights for **Browse Outlook Synchronization** and **Change Outlook Synchronization**. These rights are defined in the **Maintenance/Synchronization /Integration** group of access rights.

# Recommended Synchronization Settings

The following settings are recommended to allow your firm to take full advantage of Outlook Synchronization feature in PracticeMaster.

| Setting | Recommendation |
|---|---|
| **Synchronization Type** | Automatic |
| **Periodic Synchronization** | Enabled |
| **Periodic Synchronization Interval** | This will vary depending on the size of your firm and other factors such as whether you synchronize another device to Outlook. A shorter interval between periodic synchronizations means your Outlook data is more likely to be up to date, but also means increased network traffic. |
| **Confirmation** | Enabled |
| **Confirmation Threshold** | Initially, this value should be set fairly low. The goal of this setting should be to alert you if the number of records being synchronized is higher than usual. Once you have an idea of the usual number of records included in a periodic synchronization, you can set the threshold slightly higher than that figure. |
| **Date Range** | We recommend specifying a date range for calendar records, rather than synchronizing records for all dates. This can significantly reduce synchronization time, as a smaller window of records is checked. The default setting for a specified date range is two weeks into the past and one year into the future.<br><br>**Note:** If you are using the Microsoft 365 Exchange Connector, the maximum date range you can specify is four years. |

# Synchronizing Records

When synchronizing records between PracticeMaster and Outlook, it is important to remember that the two applications do not store information exactly the same way. Features in one application may not function the same way (or even exist) in the other. Keep the following in mind when creating, editing or deleting calendar and contact information. Additional information regarding the following can be found on page 39.

## *Calendar Records*

- Enter events that span multiple days in PracticeMaster as multiple single-day events. While Outlook supports events that span multiple days, PracticeMaster does not.

- **Recurring Events:**
    - **Microsoft 365 Exchange Connector:** Recurring events can be entered in Outlook or PracticeMaster, but must be edited or deleted from the application where they originated.
    - **All Other Outlook Integration:** Enter recurring events in PracticeMaster as individual records using the Recurring Date feature. Recurring events entered in Outlook do not synchronize to PracticeMaster.

- When entering tasks in Outlook, make sure you enter a due date for the task as well if the reminder option is set. Otherwise the reminder option will be disabled when the record is synchronized back from PracticeMaster.

- Use PracticeMaster to edit or delete calendar entries created by PracticeMaster Calendar Plan Templates.

- Edit calendar records for secure clients in PracticeMaster.

- If you are configured to allow deletion of calendar records from Outlook, when deleting calendar records from Outlook, use the Delete button or key. This allows the deletion to be synchronized automatically to PracticeMaster. Using Shift+Delete will also delete the record from Outlook; however the deletion will not be synchronized to PracticeMaster until the next periodic synchronization.

## *Contact Records*

- Delete contact records in PracticeMaster. Contacts deleted in Outlook will not be deleted from PracticeMaster, and will be synchronized back from PracticeMaster during the next periodic synchronization. This is to prevent contacts that are used

for billing in Tabs3 Billing from being accidentally deleted.

- Enter organization contacts with names that contain commas or forward slashes (/) in PracticeMaster. These characters cause PracticeMaster to treat contacts as individuals when synchronized from Outlook. Additionally names containing a comma are automatically converted to a forward slash, requiring that they be renamed after being changed to organizations in PracticeMaster.

- Enter telephone numbers with the 10-digit number. This will ensure that users synchronizing their smartphones to Outlook will have a usable phone number available.

- If you need to edit the **Full Name** field, edit the **First Name** and **Last Name** fields as well.

## *General*

- Do not use rich text formatting (bold, italics, etc.) in PracticeMaster for records that will be synchronized to Outlook. Outlook does not support rich text formatting, so it will be stripped from the record if and when synchronizing back to PracticeMaster.

- Any PracticeMaster fields that have been marked as required in File Maintenance must have the equivalent Outlook field populated; otherwise the record will be prevented from synchronizing from Outlook to PracticeMaster. If there is no equivalent field in Outlook, add it; otherwise, these records must be entered in PracticeMaster.

# *Synchronization Examples*

Let's take a look at some synchronization examples when a user is configured for automatic synchronization. We will look at examples in three different environments:

- non-Exchange environment
- Exchange environment
- Exchange Connector environment (requires PracticeMaster Platinum)

We will use the following examples:

| | |
|---|---|
| **Example 1** | User John enters a *calendar* record for John in PracticeMaster. |
| **Example 2** | User John enters a *calendar* record for John in Outlook. |
| **Example 3** | User John enters a *calendar* record for Mary in PracticeMaster. |
| **Example 4** | User John enters a *calendar* record for Mary in Outlook. |
| **Example 5** | User John enters a *calendar* record in his smartphone for user John. |
| **Example 6** | User John enters a *contact* record in PracticeMaster. |
| **Example 7** | User John enters a *contact* record in Outlook. |
| **Example 8** | User John enters a *contact* record on his smartphone. |

**Note:** Example 1 behaves the same in all three environments. The other examples behave differently in each environment.

# Non-Exchange Synchronization Examples

> **Note:** All examples assume Automatic and Periodic synchronization are enabled.

### ▶ Example 1

User John enters a calendar record for John in PracticeMaster.

- The calendar record synchronizes to Outlook ***automatically*** upon saving the entry in PracticeMaster.

### ▶ Example 2

User John enters a calendar record for John in Outlook.

- If John has PracticeMaster open, the calendar record synchronizes to PracticeMaster ***automatically*** upon saving the entry in Outlook.
- If John does not have PracticeMaster open, the calendar record synchronizes to PracticeMaster the next time John starts PracticeMaster.

### ▶ Example 3

User John enters a calendar record for Mary in PracticeMaster.

- If Mary has PracticeMaster open, the calendar record synchronizes to Mary's Outlook the ***next*** time Mary's periodic synchronization occurs.
- If Mary does not have PracticeMaster open, the calendar record synchronizes to Outlook the ***next*** time Mary starts PracticeMaster.

### ▶ Example 4

Example 4 requires Microsoft Exchange Server and therefore does not apply in a non-Exchange environment.

### ▶ Example 5

User John enters a calendar record for himself in his smartphone. As soon as he synchronizes his phone to Outlook, the record will be synchronized to PracticeMaster as follows:

- If John has PracticeMaster open, the calendar record synchronizes to PracticeMaster *automatically*.

- If John does not have PracticeMaster open, the calendar record synchronizes to PracticeMaster the *next* time John starts PracticeMaster.

> **Note:** Unlike calendar records, contact records are not tied to individual users. Therefore, when a contact is synchronized to PracticeMaster by one user, it is present in PracticeMaster for all users. The following contact examples assume that the contact is not excluded by a filter for any of the referenced users.

### ▶ Example 6

User John enters a contact record in PracticeMaster.

- The contact record synchronizes to Outlook *automatically* upon saving the entry in PracticeMaster.

- If any other users have PracticeMaster open and their contact filters do not exclude the new contact record, it will be synchronized to their local Outlook during their *next* periodic synchronization or the next time they perform a manual synchronization for themselves.

- If any other users do not have PracticeMaster open and their contact filters do not exclude the new contact record, it will be synchronized to their local Outlook the *next* time they start PracticeMaster.

### ▶ Example 7

User John enters a contact record in Outlook.

- If John has PracticeMaster open, the contact record synchronizes to PracticeMaster *automatically* upon saving the entry in Outlook.

- If John does not have PracticeMaster open, the contact record synchronizes to PracticeMaster the *next* time John starts PracticeMaster.

- If any other users have PracticeMaster open, the contact record will be synchronized to their local Outlook during their *next* periodic synchronization or the next time they perform a manual synchronization for themselves.

- If any other users do not have PracticeMaster open, the contact record will be synchronized to their local Outlook the *next* time they start PracticeMaster.

## ▶ **Example 8**

User John enters a contact record on his smartphone. As soon as he synchronizes his phone to Outlook, the record will be synchronized to PracticeMaster in the same manner as outlined in the preceding example.

# *Integration with Microsoft Exchange*

Integration with Microsoft Exchange allows more immediate synchronization of calendar entries between Exchange users. With Microsoft Exchange Integration enabled, events and tasks entered for other users in PracticeMaster are synchronized to Outlook automatically via the Exchange server instead of waiting for the next manual or periodic synchronization to occur. Additionally, contacts saved to shared folders on the Exchange server are updated for all users who access those folders.

Microsoft Exchange integration is configured in System Configuration via the **Settings | Microsoft Exchange Integration** menu options. Your User ID must have Manager rights in order to configure Exchange integration. This setting applies to all users. Once selected, each user must select an Exchange folder via the Outlook Synchronization configuration window in PracticeMaster for each record type being synchronized.
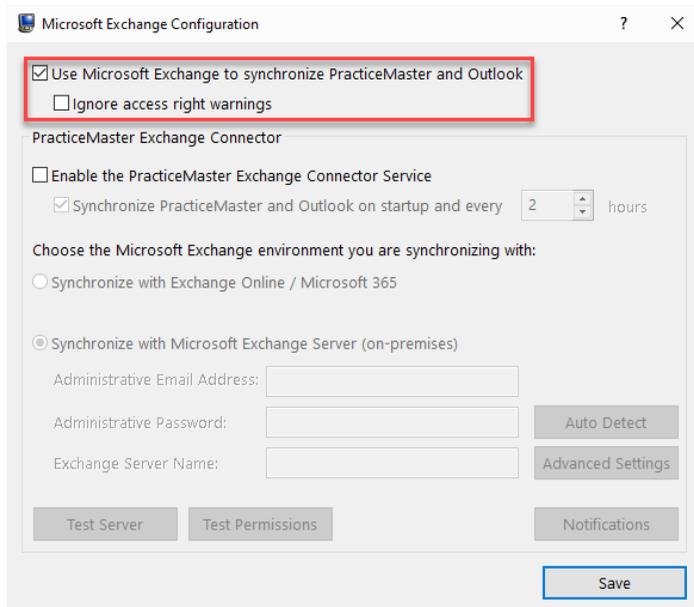


*Figure 5, Exchange Integration window*

Select the **Ignore access right warnings** check box to prevent warnings caused by insufficient rights to other users' Exchange calendars from being logged during automatic synchronization. This option is provided for firms that prefer not to allow their users access to each others' Exchange calendars. In this situation, calendar records entered for other users will not be synchronized automatically; instead they will be synchronized during manual or periodic synchronization. Each individual user must have periodic

synchronization enabled in order to synchronize records created or modified by other users.

More information on how PracticeMaster integrates with an Exchange server can be found in Knowledge Base Article **R11373** – "Microsoft Exchange Server Overview," including instructions for configuring Exchange integration.

# Exchange Synchronization Examples

Let's look at some examples of how synchronization works with Exchange. We will use the same examples found in the Synchronization Examples chapter.

> **Note:** All examples assume Automatic and Periodic synchronization are enabled for all users. Users' periodic synchronization occurs when they launch PracticeMaster and on a specified interval while PracticeMaster remains open on their workstation. Manual synchronizations for a user are assumed to be performed by that user or by another user with rights to the first user's Exchange folder unless otherwise specified.

> **Note:** Examples 1 and 2 behave the same with or without Exchange *(page 58)*.

## ▶ Example 3

User John enters a calendar record for Mary in PracticeMaster.

- Regardless whether Mary has PracticeMaster open, the calendar record **automatically** synchronizes to Mary's Outlook after saving the calendar record. However, John has to have rights to Mary's Outlook calendar. If John doesn't have rights to Mary's calendar, then the calendar record synchronizes to Outlook during Mary's **next** synchronization *(i.e., during Mary's next periodic or manual synchronization)*.

  > **Note:** If John is not configured for Outlook integration, the records will not be synchronized to Mary's Outlook calendar until her next periodic or manual synchronization.

## ▶ Example 4

User John enters a calendar record for Mary in Outlook.

- If Mary has PracticeMaster open, the calendar record ***automatically*** synchronizes to PracticeMaster after saving the calendar record.

- If Mary does not have PracticeMaster open, the calendar record synchronizes to PracticeMaster during Mary's ***next*** synchronization *(i.e., during Mary's next periodic or manual synchronization)*.

## ▶ Example 5

User John enters a calendar record in his smartphone for himself, which automatically synchronizes to John's Exchange Calendar.

- If John has PracticeMaster open, the calendar record ***automatically*** synchronizes to PracticeMaster after saving the calendar record on the phone.

- If John does not have PracticeMaster open, the calendar record synchronizes to PracticeMaster during John's next synchronization (i.e., during John's ***next*** periodic or manual synchronization).

## ▶ Example 6

User John enters a contact record in PracticeMaster.

- The contact record synchronizes to Outlook ***automatically*** upon saving the entry in PracticeMaster.

- For any other users who have PracticeMaster open and whose contact filters do not exclude the new contact record, it will be synchronized to Outlook during their ***next*** periodic synchronization or the next time they perform a manual synchronization for themselves.

- For any other users who do not have PracticeMaster open and whose contact filters do not exclude the new contact record, it will be synchronized to Outlook the ***next*** time they start PracticeMaster.

- If John is synchronizing to a shared contact folder, once the new contact has been synchronized to Outlook, it is available to all other users who synchronize to that shared contact folder.

## ▶ Example 7

User John enters a contact record in Outlook.

- If John has PracticeMaster open, the contact record synchronizes to PracticeMaster ***automatically*** upon saving the entry in Outlook.

- If John does not have PracticeMaster open, the contact record synchronizes to PracticeMaster the ***next*** time John starts PracticeMaster.

- For any other users who have PracticeMaster open and whose contact filters do not exclude the new contact record, the contact record will be synchronized to Outlook during their ***next*** periodic synchronization or the next time they perform a manual synchronization for themselves.

- For any other users who do not have PracticeMaster open and whose contact filters do not exclude the new contact record, the contact record will be synchronized to Outlook the ***next*** time they start PracticeMaster.

- If John is synchronizing to a shared contact folder, the new contact is available to all other users who synchronize to that shared contact folder.

### ▶ Example 8

User John enters a contact record on his smartphone. As soon as he synchronizes his phone to Outlook, the record will be synchronized to PracticeMaster in the same manner as outlined in the preceding example.

# Shared Contact Folders

When connecting to an Exchange server, it is possible for multiple PracticeMaster users to select the same shared public folder on the Exchange server for contact synchronization. When multiple users synchronize to the same shared contact folder, any contact changes for one user are automatically available for all users sharing that folder.

We recommend consulting with the administrator of your Exchange server before configuring PracticeMaster to synchronize to a public contact folder.

> **Note:** When multiple users share a public contact folder, category mapping must be configured identically for all users.

# *Platinum Exchange Connector Integration*

When using PracticeMaster Platinum, the Exchange Connector allows PracticeMaster to communicate directly with the Exchange server instead of via Outlook on each workstation. The Exchange Connector reduces traffic on your network by keeping synchronization activity on the server, thereby eliminating synchronization traffic from the server to the workstation. The Exchange Connector also eliminates the need to configure rights for each user's calendar folders to allow synchronization by other users.

There are two variants of the Exchange Connector. Which one you use depends on the type of Exchange server your firm uses:

- The **Microsoft 365 Exchange Connector** is used in conjunction with an Exchange Online (Microsoft 365) server.

- The **MAPI Exchange Connector** is used with all other Exchange server types, such as on-premises Exchange servers or servers hosted by companies other than Microsoft.

When using PracticeMaster Platinum, the Exchange Connector allows users to pull changes from Outlook to PracticeMaster ***without logging into PracticeMaster***. The Exchange Connector also reduces traffic on your network by keeping synchronization activity on the server, thereby eliminating synchronization traffic from the server to the workstation.

> **Note:** The Microsoft 365 Exchange Connector communicates via Tabs3 Connect and will remain active as long at the Platinum server is running. The MAPI Exchange Connector uses the PracticeMaster Accelerator to communicate with the Exchange server. Therefore, at least one user must be in PracticeMaster in order for the Exchange Connector to work.

## Exchange Connector Benefits

Benefits of the Exchange Connector include:

- PracticeMaster and Outlook stay synchronized, even when PracticeMaster is not open on your workstation.

- Periodic synchronization occurs on the server, thereby reducing network traffic.

- The Exchange Connector performs a single periodic synchronization for all users, ensuring that everyone is up-to-date.

Benefits of the Microsoft 365 Exchange Connector over the MAPI Exchange Connector include:

| Microsoft 365 Exchange Connector | MAPI Exchange Connector |
|---|---|
| Communicates directly with the Exchange server. Outlook does not need to be present on the file server. | Outlook must be installed on the Platinum server in order to communicate with the Exchange server. |
| Remains connected to the Exchange server as long as the STI Server Service is running and Tabs3 Connect is enabled. | At least one user must be logged in to PracticeMaster for the Exchange Connector to communicate with the Exchange server. |
| All changes to a user's Outlook 365 account will be synchronized automatically to PracticeMaster, regardless of where they were entered. | Changes made via an Exchange client other than the Outlook installation on a user's workstation (e.g., the Outlook phone app, webmail, etc.) will be synchronized during the next periodic synchronization. |
| **Note:** The following examples assume PracticeMaster is configured to synchronize from Outlook to PracticeMaster and automatic synchronization is enabled. | |
| Once enabled, the Exchange Connector has full rights to all of the accounts on the Exchange Online server (including future accounts) for the purposes of synchronizing records. No separate administrative user is required, and administrative credentials are not stored. | Only one "administrative" Exchange user needs access rights to other users, thus eliminating the need to assign Editor rights to all users.<br><br>Access rights to users' Exchange folders are automatically assigned to the "administrative" user as they log into PracticeMaster. |
| Calendar entries made for other users in PracticeMaster are synchronized automatically instead of waiting for the next periodic synchronization. | Calendar entries made for other users in PracticeMaster are synchronized during the next periodic sync. |

## *Key Differences in Periodic Synchronization*

There are several differences in the configuration and behavior of the periodic synchronization feature when the Exchange Connector is enabled.

- Instead of being configured in PracticeMaster on a per-user basis, periodic synchronization is configured in System Configuration, and its settings apply to ***all*** users configured for automatic synchronization.

- The minimum interval for periodic synchronization is one hour instead of 15 minutes. This is because more records are synchronized automatically when using the Exchange Connector.

- There is no indication in PracticeMaster when the periodic synchronization is running, other than by viewing the Active User List.

- Instead of initiating each time a user logs into PracticeMaster, the periodic synchronization initiates when Tabs3 Connect starts running when using the Microsoft 365 Exchange Connector or when a user logs into PracticeMaster after all other users have been logged out when using the MAPI Exchange Connector.

- When the Exchange Connector is enabled, the periodic synchronization cannot be canceled.

The following table summarizes and compares the periodic synchronization differences when using the Exchange Connector.

| | **No Exchange Connector** | **Using the Exchange Connector** |
|---|---|---|
| **Configuration** | In PracticeMaster, with individual settings for each user | In System Configuration, with a single set of settings that apply to all users |
| **Synchronizes records** | For individual users who are configured for automatic synchronization | For all users who are configured for automatic synchronization |
| **Minimum sync interval** | 15 minutes | One hour |
| **Visible when running?** | Notification are on the status bar in PracticeMaster | Active User List: User ID={EXCHNG} |
| **Initiates** | When each user configured for automatic synchronization logs into PracticeMaster | When Tabs3 Connect starts running *(Microsoft 365 Exchange Server)*<br><br>When a user logs into PracticeMaster after all other users were logged out *(MAPI Exchange Server)* |
| **Ability to cancel** | Yes | No |

# Exchange Connector Configuration

The Exchange Connector is configured in System Configuration via the ***Settings | Microsoft Exchange Integration*** menu options.

Step-by-step instructions for configuring the Exchange Connector can be found in the Knowledge Base. Which instructions to use depends on the type of Exchange server you are using:

- If you are connecting to an Exchange Online (Microsoft 365) server, see Knowledge Base Article **R11898**, "Configuring the PracticeMaster Platinum Exchange Connector for Exchange Online / Microsoft 365."

- If you are using an on-premises Exchange server or an Exchange server hosted by a company other than Microsoft, see Knowledge Base article **R11596**, "Configuring the PracticeMaster Platinum Exchange Connector."

# Exchange Connector Examples

Let's look at an example of how synchronization works with the Exchange Connector.

**Synchronization Notes:** All examples assume automatic synchronization is enabled for all users and that the Exchange Connector is enabled.

When using the Microsoft 365 Exchange Connector, periodic synchronization occurs when the Exchange Connector is enabled and and on a specified interval for all users while Tabs3 Connect is running.

When using the MAPI Exchange Connector, periodic synchronization occurs when the first user launches PracticeMaster, and on a specified interval for all users while PracticeMaster remains open.

Manual synchronizations for a user are assumed to be performed by that user or by another user with rights to the first user's Exchange folder unless otherwise specified.

**Note:** Example 1 behaves the same with or without Exchange (page 25).

▶ **Example 2**

User John enters a calendar record for John in Outlook.

- **Microsoft 365 Exchange Connector**
  - The calendar record synchronizes to PracticeMaster ***automatically***. No users have to be logged into PracticeMaster.

- **MAPI Exchange Connector**
    - If at least one user is logged into PracticeMaster, the calendar record synchronizes to PracticeMaster ***automatically***. User John does not have to be logged into PracticeMaster.
    - If no users are logged into PracticeMaster, the calendar record synchronizes to PracticeMaster the ***next time*** any user starts PracticeMaster. If the Exchange Connector is not configured for periodic synchronization, then the calendar record synchronizes to PracticeMaster the ***next time*** someone runs a manual sync for John.

▶ **Example 3**

User John enters a calendar record for Mary in PracticeMaster.

- Regardless of whether Mary has PracticeMaster open, the calendar record ***automatically*** synchronizes to Mary's Outlook after saving the calendar record.

> **MAPI Exchange Connector Note:** If John is not configured for Outlook integration, the records will not be synchronized to Mary's Outlook calendar until her next periodic or manual synchronization.

▶ **Example 4**

User John enters a calendar record for Mary in Outlook.

- **Microsoft 365 Exchange Connector**
    - The calendar record synchronizes to PracticeMaster ***automatically***. No users have to be logged into PracticeMaster.
- **MAPI Exchange Connector**
    - If at least one user is logged into PracticeMaster, the calendar record synchronizes to PracticeMaster ***automatically***. User Mary does not have to be logged into PracticeMaster.
    - If no users are logged into PracticeMaster, the calendar record synchronizes to PracticeMaster the ***next time*** any user starts PracticeMaster. If the Exchange Connector is not configured for periodic synchronization, then the

calendar record synchronizes to PracticeMaster the ***next time*** someone runs a manual sync for Mary.

▶ **Example 5**

User John enters a calendar record in his smartphone for user John, which automatically synchronizes to John's Exchange Calendar.

- **Microsoft 365 Exchange Connector**
    - The calendar record synchronizes to PracticeMaster ***automatically***. No users have to be logged into PracticeMaster.
- **MAPI Exchange Connector**
    - If one user is logged into PracticeMaster, the calendar record synchronizes to PracticeMaster ***automatically***. User John does not have to be logged into PracticeMaster.
    - If no users are logged into PracticeMaster, the calendar record synchronizes to PracticeMaster the ***next time*** any user starts PracticeMaster. If the Exchange Connector is not configured for periodic synchronization, then the calendar record synchronizes to PracticeMaster the ***next time*** someone runs a manual sync for John.

▶ **Example 6**

User John enters a contact record in PracticeMaster.

- The contact record synchronizes to Outlook ***automatically*** upon saving the entry in PracticeMaster.
- If any other users' contact filters do not exclude the new contact record, it will be synchronized to Outlook during the ***next*** periodic synchronization.
- If John is synchronizing to a shared contact folder, once the new contact has been synchronized to Outlook, it is available to all other users who synchronize to that shared contact folder.

▶ **Example 7**

User John enters a contact record in Outlook.

- **Microsoft 365 Exchange Connector**
    - The contact record synchronizes to PracticeMaster ***automatically*** upon saving the entry in Outlook. No users have to be logged into PracticeMaster.

- **MAPI Exchange Connector**
    - If one user is logged into PracticeMaster, the contact record synchronizes to PracticeMaster ***automatically*** upon saving the entry in Outlook. User John does not have to be logged into PracticeMaster.
    - If no users are logged into PracticeMaster, the contact record will be synchronized to PracticeMaster the ***next time*** anyone starts PracticeMaster. If the Exchange Connector is not configured for periodic synchronization, then the contact record synchronizes to PracticeMaster the ***next time*** John performs a manual synchronization for himself.

- For any other users whose contact filters do not exclude the new contact record, once the contact record has been synchronized to ***PracticeMaster***, it will be synchronized to ***Outlook*** during the next periodic synchronization. If the Exchange Connector is not configured for periodic synchronization, then the contact record synchronizes to Outlook the ***next time*** they perform a manual synchronization for themselves.

- If John is synchronizing to a shared contact folder, the new contact is available to all other users who synchronize to that shared contact folder.


### ▶ Example 8

User John enters a contact record on his smartphone. As soon as he synchronizes his phone to Outlook, the record will be synchronized to PracticeMaster in the same manner as outlined in the preceding example.

# *Differences between Outlook and PracticeMaster*

There are several differences in how calendar records and contacts are treated in Outlook and PracticeMaster. The following provides best practices for dealing with these differences. Additional technical differences can be found in PracticeMaster Help.

## General Notes

**Rich Text Formatting:** Rich text formatting *(i.e., bold, italics, and underline)* is not available in Outlook. Therefore, if a record with rich text formatting in PracticeMaster is changed in Outlook, the rich text formatting will be removed from PracticeMaster when the Outlook changes are synchronized back to PracticeMaster.

Rich text formatting will be removed from PracticeMaster if information in the fields is changed in Outlook and the changes are synchronized to PracticeMaster.

## Calendar Notes

**All-Day Events:** All-day events entered in Outlook have a start time of 12:00 AM and an end time of 12:00 AM, whereas all-day events entered in PracticeMaster have a start time of 12:00 AM and an end time of 11:59 PM. This difference is automatically handled during the synchronization process without making any changes.

**Multi-Day Records:** A calendar record can be added to Outlook that spans more than one day. However, multiple day events are not supported in PracticeMaster and will not synchronize correctly. Therefore, it is recommended that you add a calendar record for each day in the time period, instead of adding a multi-day event in Outlook.

- Adding a multi-day record in Outlook as an all-day event and synchronizing it to PracticeMaster will add a single record in PracticeMaster with an End Time of 11:59 p.m. for the initial day of the Outlook record. The subsequent days in the Outlook record will be excluded.

- Adding a multi-day record in Outlook with a specified start and end time will result in a synchronization warning in the Outlook Synchronization Log that states "Events spanning multiple days are not supported in PracticeMaster". The warning will be generated during automatic and periodic synchronizations the first time

PracticeMaster synchronizes the record as well as when any changes are made to the record. Although the warning will not be reported on subsequent periodic synchronizations, the warning will be reported during every manual synchronization until it is deleted from Outlook.

**Recurring Date Records (Microsoft 365 Exchange Connector):**

When the Platinum Exchange Connector is enabled with the **Synchronize with Exchange Online / Microsoft 365** option selected, recurring events can be entered in either PracticeMaster or Outlook. However, they will synchronize as a series of individual event records representing each instance of the recurring event rather than creating a recurring record in the other application.

Recurring events created in PracticeMaster:

- Remain recurring events in PracticeMaster.
- Are synchronized to Outlook as a series of individual event records.
- Can be changed or deleted from PracticeMaster, which will change or delete the entire series of linked individual events in Outlook.

**Note:** Changing or deleting an individual event record from the series in Outlook only affects *that individual event record*. The other individual event records in the series are not changed or deleted.

Recurring events created in Outlook:

- Remain recurring events in Outlook.
- Are synchronized to PracticeMaster as a series of individual event records.
- Can be changed or deleted from Outlook, which will change or delete the entire series of linked individual records in PracticeMaster.

**Note:** Changing or deleting an individual event record from the series in PracticeMaster only affects *that individual event record*. The other individual event records in the series are not changed or deleted.

**Note:** Recurring records deleted from Outlook will be deleted from PracticeMaster during the next manual or periodic synchronization.

**Recurring Date Records (All Other Outlook Synchronization Types):** Recurring items entered in Outlook are not supported and do not synchronize to PracticeMaster.

Therefore, we recommend entering recurring calendar records in PracticeMaster rather than Outlook. Knowledge Base Article **R11478**, "Transitioning Outlook Recurring Entries to PracticeMaster," includes step-by-step instructions for moving your recurring records from Outlook to PracticeMaster.

Recurring date records entered in PracticeMaster will be synchronized to Outlook as individual calendar records. Once a PracticeMaster recurring date series has been added to Outlook, the synchronization performs changes and deletions in Outlook as follows:

- If you change an individual record from a PracticeMaster recurring date series in Outlook, only that record in the series will be changed and synchronized back to PracticeMaster.

- If you delete an individual record from the PracticeMaster recurring date series in Outlook, only that record in the series will be deleted from PracticeMaster (provided you are configured to allow deletion of PracticeMaster calendar records).

> **Note:** If you want to change or delete *all* records in a PracticeMaster recurring date series, you will need to make the change or deletion in PracticeMaster.

**Deleting Records in Outlook:** A calendar record that is deleted from Outlook will not be deleted from PracticeMaster unless the **Allow deletions in PracticeMaster** check box is selected on the **Calendar** tab of the Outlook Synchronization window. Additionally, records permanently deleted in Outlook will not be deleted from PracticeMaster until the next periodic or manual synchronization occurs. If the **Allow deletions in PracticeMaster** check box is cleared, a "Synchronization Warnings Were Encountered" message will be displayed in the status bar during all subsequent periodic and manual synchronizations until the discrepancy is resolved, typically by manually deleting the record in PracticeMaster. If the calendar record that was deleted in Outlook is modified in PracticeMaster (as opposed to deleted), the calendar record will synchronize back to Outlook.

> **Note:** Calendar entries deleted in Outlook are treated differently based on whether they are deleted using the Delete key or permanently deleted using Shift+Delete. Calendar records deleted in Outlook using the Delete key without using the Shift key can be seen in the Deleted Records folder; these deletions are automatically synchronized to PracticeMaster. However, calendar records that are deleted using Shift+Delete are considered permanently deleted. These records bypass the Deleted Records folder and therefore cannot be synchronized automatically, but are picked up by the periodic synchronization.

> **Note:** In an Exchange environment, there can be a 10 minute buffer before a calendar record is available for deletion during the next synchronization if either of the following is true:
>
> - The record was created within the last 10 minutes by a user other than the one currently performing the synchronization.
>
> - You have declined a meeting request that was synchronized to PracticeMaster within that 10 minute buffer.

> **Note:** When deleting a linked calendar record in Outlook, only that user's calendar record is deleted from PracticeMaster. The other users' records will remain in PracticeMaster.

**Reminder Tasks in Outlook:** Tasks entered in Outlook with a reminder enabled must have a due date entered as well. If no due date is assigned, the reminder option will be removed from the Outlook record when it is synchronized to PracticeMaster.

**Negative Notify Values in PracticeMaster:** Because Outlook cannot accept negative values for event notifications, negative values for the **Notify Minutes** field in PracticeMaster events will be set to 0 in both applications upon synchronization with Outlook.

**Outlook Categories:** Outlook categories are automatically mapped to PracticeMaster Calendar Codes based on the **Category Name** field in Outlook and the **Description** field in PracticeMaster. If these values match, then a record created in Outlook and assigned to a category will be synchronized to PracticeMaster with the corresponding calendar code, and vice versa. If you do not want categories and calendar codes to correspond, simply ensure that these fields do not match between Outlook and PracticeMaster. Additionally, keep the following in mind:

- If a PracticeMaster calendar code does not have a corresponding category in Outlook, then "Not in Master List" will be shown for the Outlook category after synchronization.

- If more than one category is assigned to a record in Outlook, only the last category added to the record will be synchronized. Any additional categories will be removed from the PracticeMaster record during synchronization, as well as from the original Outlook record if PracticeMaster to Outlook synchronization is enabled.

- Additions, changes, or deletions to Outlook categories or PracticeMaster calendar codes must be made manually in the other application to maintain the match.

**Calendar Records Assigned to a Client:** Calendar records assigned to a client in PracticeMaster can be configured to display the Client ID and Client Name in the Outlook **Subject** field. Calendar records created in Outlook cannot be associated with a PracticeMaster Client ID. However, after the record is synchronized from Outlook, you can edit the record in PracticeMaster and assign it to a client and/or contact.

**Calendar Plan Template Records:** Once a PracticeMaster Calendar Plan Template has been used to generate a series of calendar records, those records are added to Outlook. However, ***if you need to change or delete Calendar Plan records, do so using PracticeMaster rather than Outlook***. If you change or delete Calendar Plan records in Outlook, the information will be resynchronized based on the data from PracticeMaster, thereby ***canceling the change or deletion that was made in Outlook***. Specifically, the synchronization process treats changes and deletions made in Outlook to Calendar Plan records as follows:

- If you change or delete a Calendar Plan record in Outlook, the synchronization process will re-synchronize the PracticeMaster records during the next manual or periodic synchronization.

> **Note:** Alarms for Calendar Plan records that have been snoozed or dismissed in Outlook will also be reverted to their previous setting during the next manual or periodic synchronization.

**Private Calendar Records:** Private calendar records are synchronized from PracticeMaster to Outlook as private and vice versa. Users without rights to other users' private calendar records in PracticeMaster can see the start and stop time, but cannot see any details of the calendar record.

**Secure Clients:** Calendar records for secure clients are passed to Outlook with the following limitations. Only the **Date**, **Time**, **Active Alarm** information, and **Private** status is passed to Outlook. The **Description** field is passed with the text "PM Secure Record," instead of the actual description. The **Work Description**, **Comments**, and **Calendar Code** fields are not passed. Changes made to calendar records in Outlook for secure clients in PracticeMaster are not synchronized to PracticeMaster. Calendar records for secure clients can only be synchronized by users with access to those secure clients.

> **Note:** You will need to add, change, or delete calendar records for secure clients in PracticeMaster, as modifications made to secure clients in Outlook are not synchronized back to PracticeMaster.

**History Tracking:** The History Tracking log file is updated when Outlook calendar records are synchronized to PracticeMaster (for fields that are configured for history tracking). However, the User ID that performs the synchronization will be listed as the user who made the change (as opposed to the user who actually added or changed the record). This is important to keep in mind if you are using Microsoft Exchange and you synchronize for multiple users at the same time.

**Conflict Checking:**Calendar conflict checking is not performed on events synchronized from Outlook.

**Time Zones** - PracticeMaster supports multiple time zones. Enabling time zone support is a one-time process for users who updated to Version 20.2 or later from a prior version of PracticeMaster, but is enabled by default for new users. When time zone support is enabled, Outlook and PracticeMaster will synchronize calendar records with time zones.

For legacy calendar records without a specified time zone, PracticeMaster does not support multiple time zones.

**Disabling Reminders in Outlook:** Outlook includes an option to prevent reminders (alarms) from being displayed. We do not recommend enabling this option, as it disables alarms in Outlook by dismissing them when they are scheduled to be displayed. If automatic synchronization is enabled, this dismissal is automatically synchronized to PracticeMaster, thus preventing the alarm from being displayed in PracticeMaster as well. Steps to enable reminders in Outlook can be found in Microsoft Knowledge Base Article **2787708**, "Reminders in Outlook do not appear."

**Dragging and Dropping in Outlook:** Dragging and dropping or copying and pasting a calendar entry from your calendar to another user's calendar in Outlook is not recommended when integrating with PracticeMaster. Doing so may result in the deletion of your original calendar record or the copied record during the next synchronization. Instead, add the other user to your calendar record in PracticeMaster, or create a new calendar record in Outlook for that user.

# Contact Notes

**Private Contacts:**There is no concept of private contacts in PracticeMaster. All PracticeMaster users with rights to the Contact File can see all contacts. However, there is the concept of secure clients in PracticeMaster. Secure clients in PracticeMaster typically do not have contact records and therefore are not synchronized to Outlook. Each user has the option of synchronizing private Outlook contacts to PracticeMaster.

**Deleting Contacts:** Contacts deleted in PracticeMaster will also be deleted in Outlook. However, contacts deleted in Outlook will not be deleted in PracticeMaster. This is by design so that billing contact information is not deleted. Furthermore, contacts are shared by all users in PracticeMaster, and you may not want one user's contact deletions to affect other users. If there are contacts in PracticeMaster that need to be in PracticeMaster, but you don't want them synchronized to your Outlook, you have several options.

- You can select the **Do Not Sync** check box in the PracticeMaster contact record; however, this affects all users that integrate with Outlook.

- You can change the **User/Group** field in the contact record to a group and/or list of users that does not include you (if you have the user filter configured to only synchronize contacts assigned to you).

- You can assign a category to the contact and then exclude those categories from synchronization using the category filter.

- You can create a custom filter using the desired criteria to exclude the contact.

**Individual vs. Organization:** During the initial synchronization of a contact from Outlook, the contact will be designated as an individual by default. However, if the Outlook **Full Name** field is blank and the Outlook **File As** field matches the Outlook **Company** field, the contact will be designated as an organization. New contacts synchronized from Outlook will use the default address and phone selectors based on their contact type.

> **Note:** This scenario assumes that the Outlook **Company** field is mapped to the PracticeMaster **Organization** field (as it is by default). If another Outlook field has been mapped to the **Organization** field, then that field must match the **File As** field.

**Organization Names with Commas or Slashes:** During the synchronization process for a new contact entered in Outlook, PracticeMaster converts the first comma present in the Outlook **File As** field to a forward slash (/) and designates the contact as an individual rather than an organization. For example, an Outlook contact of "Company Name, Inc." would be synchronized as an individual contact in PracticeMaster with a **Contact ID** of

"Company Name/Inc." Changing these contacts to organizations in PracticeMaster would result in the Organization field changing to match the **Contact ID** at which point it would be necessary to use the Rename Contact utility to correct the contact's name. Additionally, a company with a forward slash in its name would also synchronize as an individual and would have to be manually changed to an organization in PracticeMaster. Organizations with a comma or slash in their name can be entered in PracticeMaster to prevent this from occurring.

**Changing the Full Name field in PracticeMaster:** Changing the **Full Name** field in PracticeMaster does not change the **First Name** and **Last Name** fields in PracticeMaster or Outlook. However, changing the **First Name** or **Last Name** fields in PracticeMaster will change the **First Name** and **Last Name** fields in Outlook and vice versa.

**Setting the Outlook "File As" field using PracticeMaster:** PracticeMaster will set the **File As** field in Outlook as follows when adding a record in PracticeMaster, or when any of the following mapped Outlook fields has changed in PracticeMaster: Title, FirstName, MiddleName, LastName, Suffix, CompanyName.

- If the contact is an organization, the **Contact ID** field is used (RP_Key).

- If the contact is an individual, the Title, First Name, Middle Name, and Last Name are used. If none of these fields have values, then the **Contact ID** field is used (RP_ Key).

**Renaming a Contact ID field in PracticeMaster:** If you rename a contact in PracticeMaster, the change will not be reflected in the Outlook **File As** field. If you want the new **Contact ID** field in Outlook, you must delete the old contact in Outlook and perform a manual synchronization. This is because a record number is used to link the Outlook and PracticeMaster records, not the **File As** field.

**Phone Number Formatting:** Phone fields in PracticeMaster accept any format. We recommend always using area codes; this will make it easier for those users that synchronize Outlook with mobile devices. All characters entered in a PracticeMaster phone field will integrate with Outlook, regardless of the format used. However, if a phone number is edited in Outlook, it will synchronize back to PracticeMaster using Outlook's preferred "(402) 419-2200" format.

**Country** - The **Country/Region** field in Outlook does not synchronize to the **Country** field in PracticeMaster unless a country other than the United States is specified.

# *Critical Synchronization*

Whenever certain events occur in PracticeMaster, a critical synchronization with confirmation must be performed. Critical synchronization is a synchronization process designed to ensure that PracticeMaster and Outlook calendar and contact records are properly set for synchronization. A Critical Settings Change message will be displayed indicating a critical synchronization is required when any of the following configuration settings are changed:

- Enable synchronization for Events, Tasks, or Contacts

- The Outlook Folder selected for Events, Tasks, or Contacts is changed

- Calendar Subject Mapping is changed

-  Calendar Description Mapping is changed

- Contact Field Mapping is changed

-  Contact Category Mapping is changed

During the critical synchronization process, PracticeMaster will compare the records to determine if they are already linked and whether any changes need to be made. If any changes are necessary, the Outlook Synchronization Confirmation window will be displayed, allowing you to view the differences and select which record to use. Once the confirmation window has been reviewed and the critical synchronization completed, a manual synchronization will be performed.

> **Important:** During the critical synchronization process, records from one application may be overwritten by corresponding records from the other application. Therefore it is crucial that you review all of the records displayed in the confirmation window ***before*** proceeding with the synchronization.

# *Status Bar*

Various messages regarding Outlook synchronization display in the status bar at the bottom of the PracticeMaster window including:

**Synchronizing PracticeMaster and Outlook**

This message indicates that a synchronization is currently in progress. No action is required. You can cancel the synchronization by clicking the message on the status bar.

Synchronizing PracticeMaster and Outlook ▼

**Trimming Outlook Synchronization Log**

This message indicates that the Outlook Synchronization Log has reached its maximum size and the oldest entries are in the process of being deleted. You can cancel this process by clicking the message in the status bar.

Trimming Outlook Synchronization Log ▼

**Synchronization Warnings Were Encountered (XX)**

This message indicates that an unsuccessful log entry was recorded during the synchronization process and also indicates the total number of warnings detected during the synchronization. Clicking the message on the status bar will open the Outlook Synchronization Log allowing you to review the warnings. It is important to note that synchronization of all other entries still occurred and the synchronization will continue taking place in the future.

Synchronization Warnings Were Encountered (1) ▼

**Outlook Synchronization Suspended**

This message indicates that synchronization is unable to complete, typically due to one of several reasons. Synchronization will not resume until the issue has been resolved. Because synchronization has stopped, this message is shown in red to help distinguish this message from other Outlook synchronization messages in the status bar. Clicking the message on the status bar will open the appropriate window to resolve the issue.

Outlook Synchronization Suspended ▼

**Task Synchronization Suspended**

This message is displayed when the PracticeMaster Exchange Connector requires authorization to synchronize tasks with an Exchange Online / Microsoft 365 server. You must specify your Exchange Online credentials in order to continue synchronizing tasks. Clicking on this message will open the Outlook Synchronization window and prompt you for your credentials.

Task Synchronization Suspended ▼

# Synchronization Suspended

Reasons for synchronization suspension include:

- The confirmation threshold has been reached or a synchronization exception has been detected, and you must review the confirmation window before the synchronization can proceed. Clicking the message on the status bar will display a message prompting you to review the items before continuing with the confirmation process.

- A critical synchronization setting has been changed, requiring a critical synchronization. Clicking the message on the status bar will display a message prompting you to run a critical synchronization.

- PracticeMaster data has been restored from a backup, and the synchronization process has detected previously synchronized Outlook records that are no longer present or are out of date in PracticeMaster because of the restore. Clicking the message on the status bar will display a message prompting you to confirm the Outlook records found, after which the confirmation window will be displayed.

- When migrating from the MAPI Exchange Connector to the Microsoft 365 Exchange Connector, synchronization of tasks is suspended for each user until they enter their Exchange server credentials.

Whenever synchronization has been suspended, in addition to the red "Outlook Synchronization Suspended" message shown in the status bar, a message box will be displayed.

```
Your Outlook synchronization has been suspended.

Click the "Outlook Synchronization Suspended" text in the
PracticeMaster status bar for more information.
```

Clicking the status bar message will display one of the following messages.

```
Outlook Synchronization suspended.

Your Outlook Synchronization settings require confirmation when at
least (XX) record(s) will be synchronized. Would you like to
confirm these records now?
```

<p align="center"><em>or</em></p>

```
Outlook Synchronization suspended.
```

> Exceptions were encountered and must be corrected manually. Would
> you like to view these records now?

Clicking **Yes** will open an Outlook Confirmation Window *(page 52)* allowing you to view exactly which records will be synchronized.

# *Outlook Confirmation Window*

The Outlook Confirmation window includes a list of the adds, changes, and deletions that are about to take place during synchronization. This window is displayed when the confirmation threshold is met or when an exception occurs.
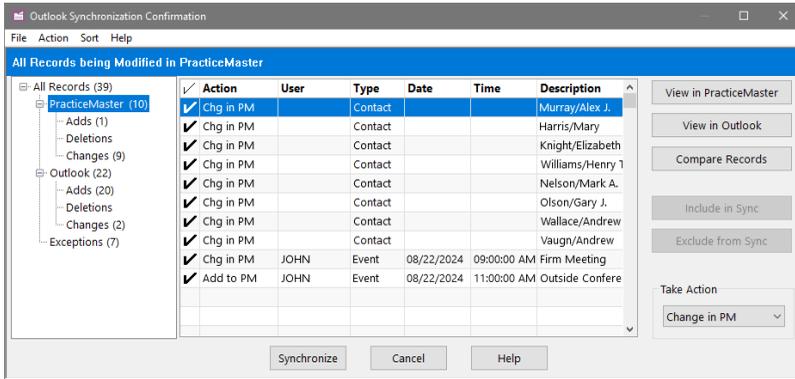


*Figure 6, Outlook Synchronization Confirmation window*

> **Caution:** It is extremely important to take your time in this window, particularly during the initial synchronization. Failure to review this information before continuing can result in situations where restoring from a backup will be necessary or a great deal of manual effort may be required to correct information.

# Synchronization Information

There are several ways to view information that has been synchronized.

## *Outlook Sync Log*

| | |
|---|---|
| **Menu:** | ***View | Log Files | Outlook Sync Log*** |
| **Quick Launch:** | ***Outlook Sync Log*** |

The Outlook Sync Log in PracticeMaster records changes made during the Outlook Synchronization process. At the beginning of a periodic or manual synchronization, a **Start** entry is created. Then, any records that were added, changed, or deleted by the synchronization will be included in the log along with any errors received during the synchronization. Each event will be recorded in a separate entry. Finally, a **Stop** entry is added, indicating that the synchronization is complete. Individual entries that are synchronized automatically do not include **Start** or **Stop** entries. The selected entry can be opened in Outlook or PracticeMaster by clicking the **View in Outlook** or **View in PracticeMaster** options in the Take Action section of the Quick Clicks Pane.
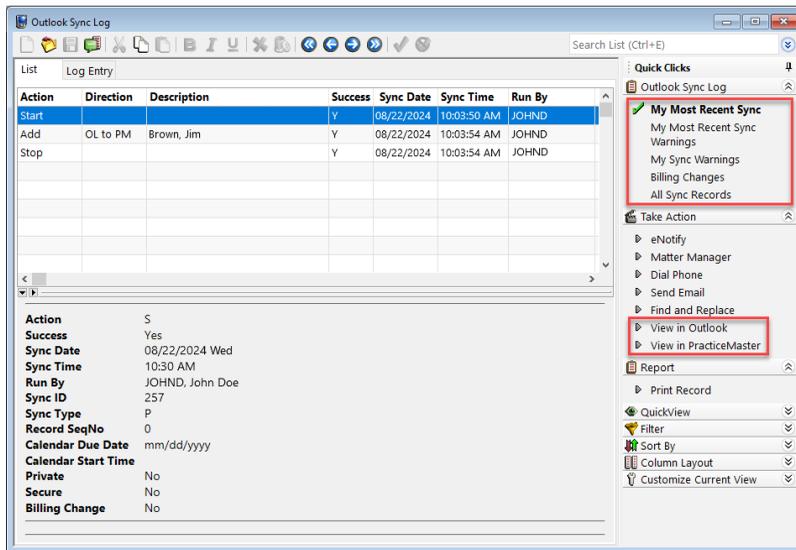


*Figure 7, Outlook Sync Log window*

The **List** tab contains a listing of synchronization records. This listing can be filtered one of four ways using the Outlook Sync Log section of the Quick Clicks Pane:

- **My Most Recent Sync:** When this option is selected, only the records from your most recently performed synchronization will be displayed.

- **My Most Recent Sync Warnings:** When this option is selected, only the records from your most recently performed synchronization with a value of "No" in their **Successful** field will be displayed

- **My Sync Warnings:** When this option is selected, all log records assigned to the current user with a value of "No" in their **Successful** field will be displayed.

- **Billing Changes:** This option displays all synchronization log records involving a change to a contact assigned to a billing record.

- **All Sync Records:** This option displays an unfiltered list of synchronization log records.

When the oldest entry in the log reaches six weeks, all entries four weeks and older will be trimmed from the synchronization log. However, log entries related to billing changes will not be deleted. This process is initiated when PracticeMaster is launched, and a "Trimming Outlook Synchronization Log" message is displayed on the PracticeMaster Status Bar *(page 48)*.

## Synchronization Report

| | |
|---|---|
| **Menu:** | *Reports | Report Writer | SyncRpt* |
| **Home:** | *All Actions | Reports | Report Writer Reports | Outlook Synchronization Report (RW)* |
| **Quick Launch:** | *Outlook Synchronization Report (RW)* |

The Synchronization Report provides another way of viewing synchronization entries. The Outlook Sync Log in PracticeMaster contains multiple items for each synchronization and can be challenging to work with because of the extra detail. The Synchronization Report may be easier to work with.

## Outlook Sync Billing Changes Log

| | |
|---|---|
| **Menu:** | *View | Log Files | Outlook Sync Billing Changes Log* |
| **Quick Launch:** | *Outlook Sync Billing Changes Log* |

Because changes made to contacts in PracticeMaster are mirrored to Tabs3 Billing, a log is maintained in Tabs3 Billing for all billing contact changes. Changes made to billing contacts in Tabs3 Billing can affect where statements are mailed or emailed; therefore, this log provides an audit trail to determine who made the change and when it was made.

Changes made in Outlook to billing contacts can only synchronize if the **Allow changes to billing contacts** check box on the **Contacts** tab of Outlook Synchronization window is selected.

# *Frequently Asked Questions*

### Can I add new clients to Outlook?

You can add contact information for new clients in Outlook. Once the contact has synchronized to PracticeMaster, do one of the following:

- Open the Contact file in PracticeMaster. From the **List** tab, highlight the contact. In the Quick Clicks pane, click **Create Client**.

- Open the Client file in PracticeMaster or Tabs3 Billing and press Ctrl+N. After assigning the client ID and typing in the client name, the contact record will be displayed allowing you to save the new client with that client contact.

### What if I want to see which changes are being made?

Outlook Synchronization includes a confirmation option that lets you view a confirmation window whenever the specified number of changes is being processed during a periodic or manual synchronization. When this limit is reached, a message will be displayed on the status bar in PracticeMaster stating "Outlook Synchronization Suspended". Once synchronization is suspended, no new records will be synchronized until the confirmation window is reviewed. We recommend you leave confirmation enabled with the threshold set relatively low until you are comfortable with the synchronization process. Leaving the confirmation enabled with a higher threshold will still alert you when a large number of records are being synchronized. Setting the threshold at "1" allows you to be notified whenever a change is made via the periodic or manual synchronization. However, individual changes that are made do not suspend the synchronization. If you want to see every change that has been made, run an Outlook Synchronization Report in PracticeMaster or view the Outlook Sync Log in PracticeMaster.

### How do I see changes that were previously made?

Run an Outlook Synchronization Report in PracticeMaster or view the Outlook Sync Log in PracticeMaster.

### Can I limit the records that are synchronized?

For calendar records, you can specify whether events or tasks (or both) are synchronized as well as the range of time to be synchronized (e.g., 2 weeks of past

records and 12 months of future records). Additionally, you can specify whether calendar records deleted in Outlook will be deleted in PracticeMaster.

For contact records, you can filter by the user and category assigned to the record, as well as create a custom filter using the Query Expression Editor.

### *My firm has an Exchange server. How does this affect Outlook synchronization?*

For firms with the non-Platinum edition of PracticeMaster utilizing a Microsoft Exchange server, calendar records entered for other Exchange users are automatically synchronized rather than having to wait for the next periodic synchronization. This requires that the user entering the records has rights to the other users' calendar on the Exchange server, otherwise these entries will be included in the next periodic synchronization.

Firms with PracticeMaster Platinum can utilize the PracticeMaster Exchange Connector. The Exchange Connector provides a direct link between the Platinum Server and the Exchange Server via a specially configured Exchange user.

### *An attorney wants to only synchronize his client contacts. How can he do this?*

When the contact is added, specify the User ID for the attorney in the User/Group field. The User ID is different from the timekeeper number. This must be done manually for contacts added in PracticeMaster. However, the **User/Group** field is automatically filled in with the User ID for any contacts that are added in Outlook and synchronized to PracticeMaster. Then, when configuring contact synchronization for that attorney, on the **Contacts** tab, select the **Sync contacts assigned to these users** check box and then select that attorney's User ID.

### *What is the difference between manual and periodic synchronization?*

Manual and periodic synchronizations are essentially the same, with the difference being when they are launched. A manual synchronization must be launched manually, whereas a periodic synchronization is launched automatically when the software is started and at a predefined interval.

### *What happens if multiple synchronizations occur at the same time?*

A periodic sync will only commence if no other synchronization is running. If another synchronization is running, it will be delayed until the other

synchronization is completed.

### Does the Exchange Connector use any additional Platinum server connectors or PracticeMaster user licenses?

When enabled, the Exchange Connector does **not** use any additional Platinum server connections or PracticeMaster user licenses. Instead, the Exchange Connector uses Tabs3 Connect's or the PracticeMaster Report Accelerator's existing server connection (depending on the type of Exchange server). Additionally, while the periodic synchronization is performed by a user named "EXCHNG" when viewed in the Active User List, this user does not count toward the Active User Limit in PracticeMaster.

### What happens if I attempt to start an exclusive or super exclusive function while a periodic synchronization is running?

Any active periodic synchronization is automatically stopped when an Exclusive or Super Exclusive function is launched. The process to stop the periodic synchronization can take up to one minute for the Exchange Connector or up to 30 seconds for the standard periodic synchronization. Once the Exclusive or Super Exclusive function is complete, the periodic synchronization will automatically restart. See Knowledge Base Article **R11817**, "Network and Multi-User Functionality in Tabs3 Software," for more information on Exclusive and Super Exclusive functions.

> **Note:** Whenever a periodic synchronization is stopped for an Exclusive or Super Exclusive function, a "Outlook Synchronization Aborted" message will be added to the Outlook Sync Log.

# *Field Mapping*

Detailed field mapping tables can be found in PracticeMaster Help using the keywords of **Outlook | Field Mapping**.
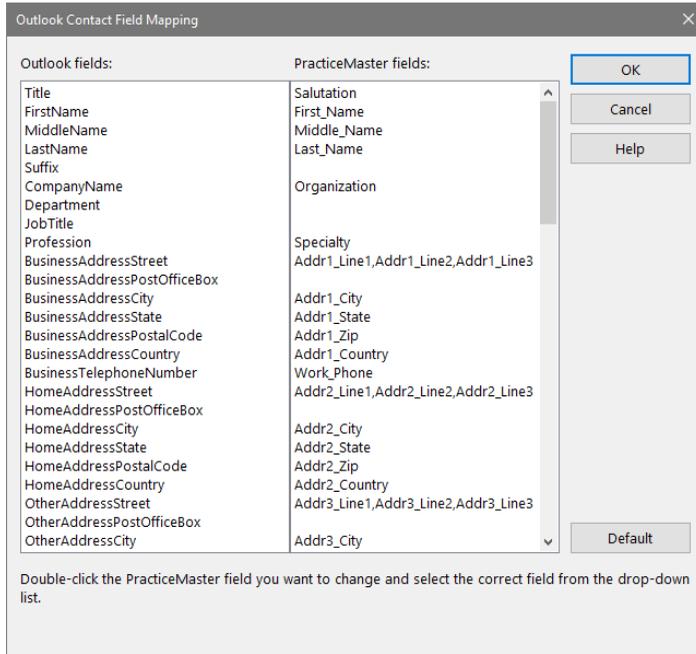


*Figure 8, Outlook Contact Field Mapping window*

# *Troubleshooting Resources*

Detailed troubleshooting information can be found in the following Knowledge Base Articles:

- **Microsoft 365 Exchange Connector: R11898** - Configuring the PracticeMaster Platinum Exchange Connector for Exchange Online / Microsoft 365

- **MAPI Exchange Connector: R11597** - Troubleshooting the PracticeMaster Platinum Exchange Connector

- **General Outlook Synchronization: R11368** - Troubleshooting Outlook Calendar & Contact Integration Issues

# *Suppressing Synchronization at Startup*

In the event you want to prevent synchronization from occurring when PracticeMaster is launched, you can use the "/NO_OUTLOOK" startup option. An example of the No Outlook startup option follows:

**"C:\Program Files\Tabs3\CM.EXE /NO_OUTLOOK"**

While this option is enabled, calendar and contact records will not be synchronized with Outlook. Additionally, while email records can be linked to PracticeMaster using the Outlook Plug-in, the **CalendarPM**, **FeePM**, and **JournalPM** columns in Outlook will not be updated.

# *Technical Information*

The following information may be helpful for troubleshooting purposes and understanding how PracticeMaster and Outlook integration works.

## Record Identifiers

PracticeMaster integrates with Outlook by using unique record identifiers in each system.

- **Calendar** – Calendar integration requires integration with a ***single Outlook calendar***. In the PracticeMaster calendar file, each calendar record that integrates with Outlook is assigned a Sequence Number. Each Outlook calendar record has a unique Outlook Entry ID. Both the Sequence Number and Outlook Entry ID fields are stored in both PracticeMaster and Outlook.

- **Contact** – Contact integration lets you integrate with ***multiple Outlook folders***. In the PracticeMaster contact file, each contact record that integrates with Outlook is assigned a Sequence Number. Because the same contact in PracticeMaster can integrate with multiple Outlook Contact folders, each Outlook contact is given a unique Outlook Entry ID. This means that the same contact in different users' Outlook can have a different Outlook Entry ID. The PracticeMaster Sequence Number is written to each contact record in all Outlook contact folders with which it integrates. Because each contact record in each contact folder has a different Outlook Entry ID, the Outlook Entry ID is not stored in PracticeMaster.

## MAPI Notifications vs. Synchronization

**MAPI Notifications** – When a calendar or contact record is added or changed in Outlook, Outlook sends a MAPI notification to PracticeMaster. PracticeMaster reads this MAPI notification and makes the corresponding record addition or change in PracticeMaster. From a technical standpoint, these automatic individual record synchronizations are handled via a MAPI notification as opposed to a true synchronization. MAPI notifications are shown in the Outlook Sync Log without **Start** or **Stop** entries.

**Synchronization** – When a synchronization occurs, whether it is manual or periodic, PracticeMaster locates and compares the record associated with the PracticeMaster Sequence Number to the record associated with the Outlook Entry ID to determine which record adds, changes, and deletions are missing from the other software.

# Comparing Types of Synchronization

The following table compares the differences between the synchronization types in the different environments: Non-Exchange, Exchange, and Exchange Connector. Users are represented by the letters A, B, and C.

| | | Non Exchange | | Exchange | | Exchange Connector | |
|---|---|---|---|---|---|---|---|
| | | Calendar | Contacts | Calendar | Contacts | Calendar | Contacts |
| **Manual Syncs** | PracticeMaster to Outlook: A to A | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| | PracticeMaster to Outlook: A to B/C | | | ✓[1] | | ✓[1] | |
| | Outlook to PracticeMaster | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Automatic Syncs** | PracticeMaster to Outlook: A to A | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| | PracticeMaster to Outlook: A to B/C | | | ✓[2] | | ✓[3] | |
| | Outlook to PracticeMaster | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Periodic Syncs** | Periodically Sync (for Self) | ✓[4] | ✓[4] | ✓[4] | ✓[4] | n/a | n/a |
| | Periodically Sync for All Users | | | | | ✓[5] | ✓[5] |

[1] Proper Exchange permissions need to be set accordingly in Outlook. Additionally, User A must have Users B/C specified in the configuration window when performing the manual synchronization.

[2] Proper Exchange permissions need to be set accordingly in Outlook.

[3] Proper Exchange permissions need to be set accordingly only for the Exchange Connector User in Outlook.

[4] The user that is periodically syncing must be logged into PracticeMaster and have periodic sync enabled. Periodic sync is for that user only.

[5] Only one user needs to be logged into PracticeMaster and that user does not need to have Outlook Synchronization configured.

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