

Oracle® Hospitality Suite8
Export to Outlook User Manual
Release 8.9

July 2015

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Preface

Audience

This user manual is intended for system users and system administrators.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com/>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at

<http://docs.oracle.com>

Revision History

Date	Description of Change
July, 2005	<ul style="list-style-type: none">• 8.5.0.0 - First Issue Small Business Edition
May, 2008	<ul style="list-style-type: none">• 8.7 - Updated for Version 8.7
June, 2008	<ul style="list-style-type: none">• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	<ul style="list-style-type: none">• 8.8 - Updates for Version 8.8
Sept, 2010	<ul style="list-style-type: none">• 8.8 - Updates for Oracle 11gR1
Jan, 2012	<ul style="list-style-type: none">• 8.9 - Updated for Version 8.9
Nov, 2012	<ul style="list-style-type: none">• 8.9 - New cover page
July, 2015	<ul style="list-style-type: none">• 8.9 - Oracle template applied

1 Export to Outlook

This option may be used to export profile information to MS Outlook folders and is accessible via the option EXPORT TO OUTLOOK on the MISCELLANEOUS menu.

Information such as the following can be exported:

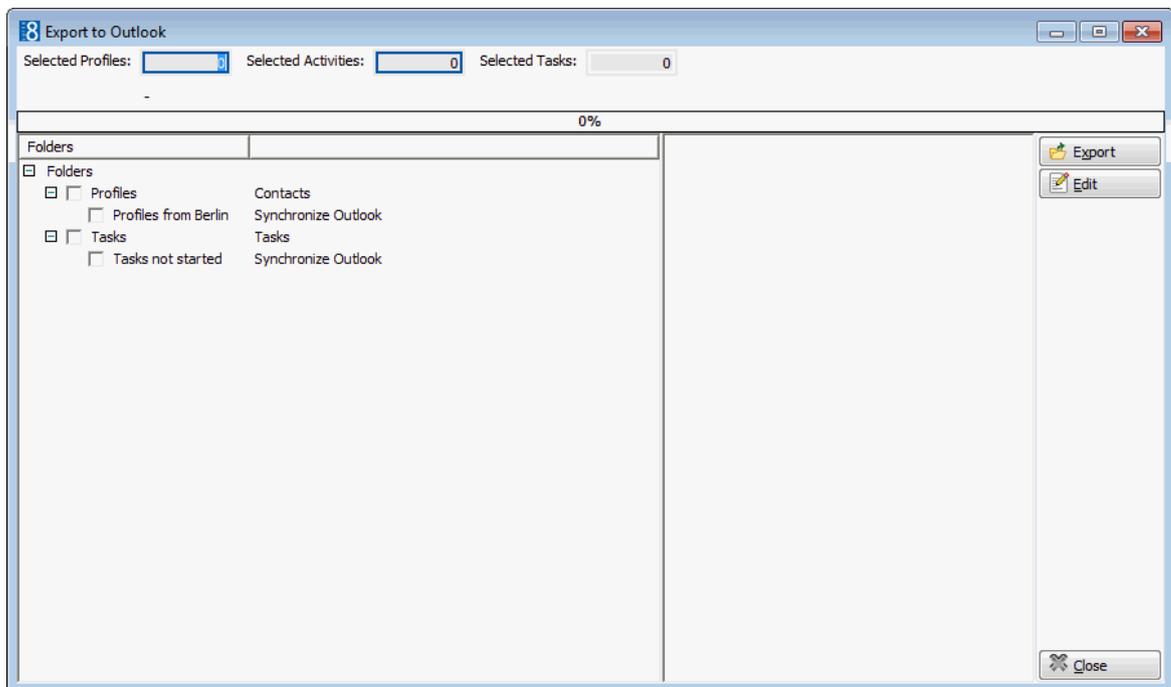
- Individual profiles, companies and all linked individuals
- Addresses and communications
- Birth dates and notes
- Linked tasks and activities

Note: The export should be run manually as often as required; it is not an automated process.

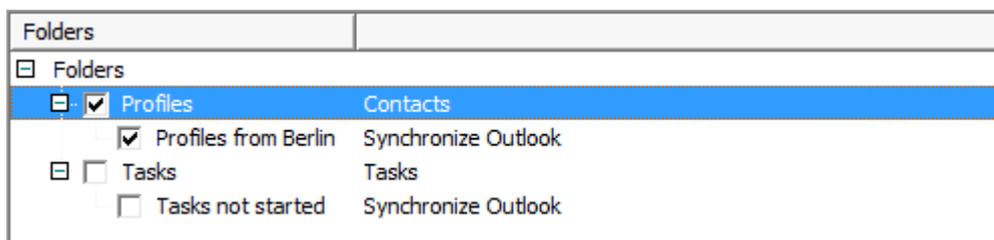
How to run the export to MS Outlook

1. Click the MISCELLANEOUS menu and select EXPORT TO OUTLOOK.

The Export to Outlook screen is displayed.



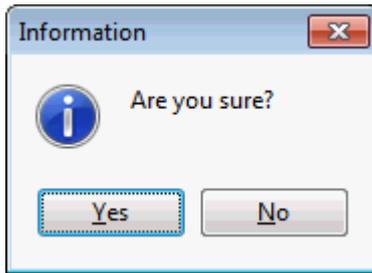
2. Select the folder and operation to synchronize so that both the folder and the operation are marked as selected .



Depending on the folders selected the number of records will be displayed in the SELECTED PROFILES, SELECTED ACTIVITIES and SELECTED TASKS boxes at the top of the screen.

3. Click the EXPORT button.

A confirmation message is displayed.



4. Click YES to continue; enter the MS Outlook password if requested.
5. Depending on your MS Outlook settings, you may be prompted with a message from MS Outlook requesting access permission.
6. Select the check box ALLOW ACCESS FOR and click YES.
7. Once access is granted the export to MS Outlook starts and the export process is displayed on the Export to Outlook screen.

```
Tradeways Inc.  
-Finished synchronization Tradeways Inc.  
Marritz Conferences  
Ball, Sandy  
-Finished synchronization Ball, Sandy  
-Finished synchronization Marritz Conferences  
-Finished synchronization Toast, Thomas  
Maier, Max  
-Finished synchronization Maier, Max  
Demo, Igor  
-Finished synchronization Demo, Igor  
Schuster, Solveig  
-Finished synchronization Schuster, Solveig
```

8. The export process is finished when the message 'Finished database synchronization' is displayed in the export process window.
 9. Click CLOSE to exit the Export to Outlook screen.
-  Folders and sub folders are defined via the options Folders under Setup → Configuration → Miscellaneous → Export to Outlook.

2 Export to Outlook Setup

Folders

The folders and export operations required to export information from Suite8 to MS Outlook are defined via the option FOLDERS in the configuration.

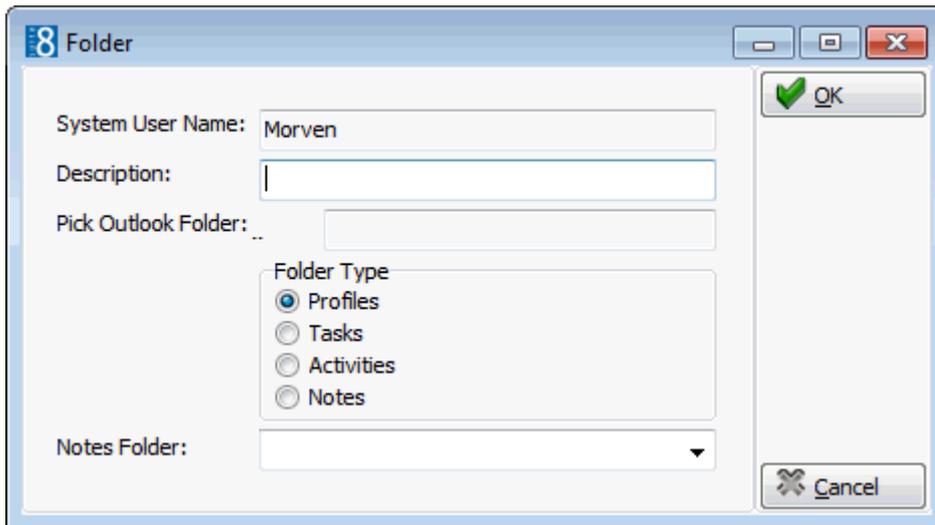
In order to define the folders and operation the folder NOTES must first be created in MS Outlook so that it can be selected when creating the folders in Suite8.

In order to pass notes to MS Outlook and enable the correct linkage of notes for each corresponding record, the folder NOTES with the Folder Type NOTES must then be created in Suite8.

How to create the notes folder

1. Create a folder with a name such as V8 NOTES in MS Outlook.
2. On the SETUP menu select CONFIGURATION to display the configuration options.
3. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
4. Click FOLDERS to display the Folders screen.
5. Click NEW FOLDER.

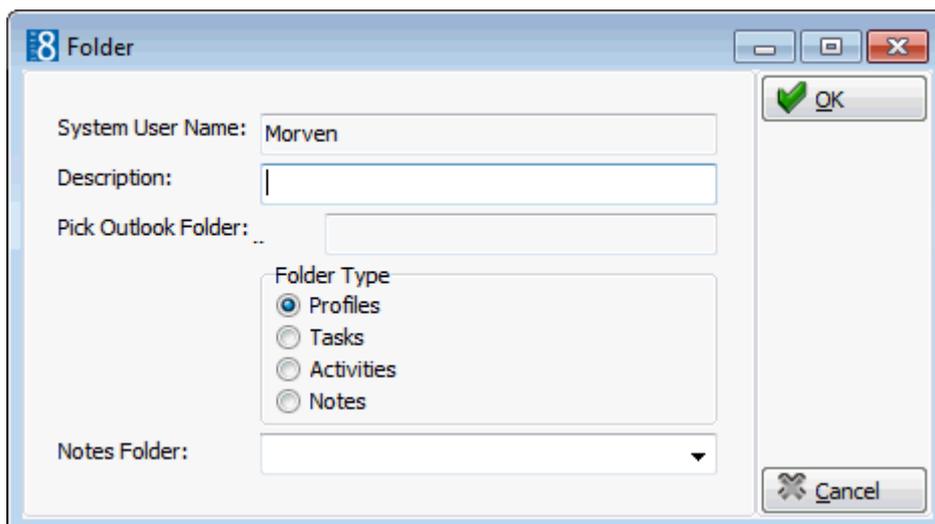
The Folder dialog box is displayed.



6. The SYSTEM USER NAME is view only and displays the name of the MS Outlook User.
7. In the DESCRIPTION box enter NOTES.
8. In the PICK OUTLOOK FOLDER BOX, click the three dots button and select the MS Outlook Notes folder created in step 1.
9. Select NOTES for the FOLDER TYPE.
10. Click OK to save the folder.

How to create a new folder

1. On the SETUP menu select CONFIGURATION to display the configuration options.
2. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
3. Click FOLDERS to display the Folders screen.
4. Click NEW FOLDER; the Folder dialog box is displayed.



6. The SYSTEM USER NAME is view only and displays the name of the MS Outlook User.
7. In the DESCRIPTION box enter a name for the folder.
8. In the PICK OUTLOOK FOLDER BOX, click the three dots button and select the corresponding MS Outlook Folder.
9. Select the required FOLDER TYPE.
10. In the NOTES box, click the drop-down arrow and select the NOTES Folder.
11. Click OK to save the folder.

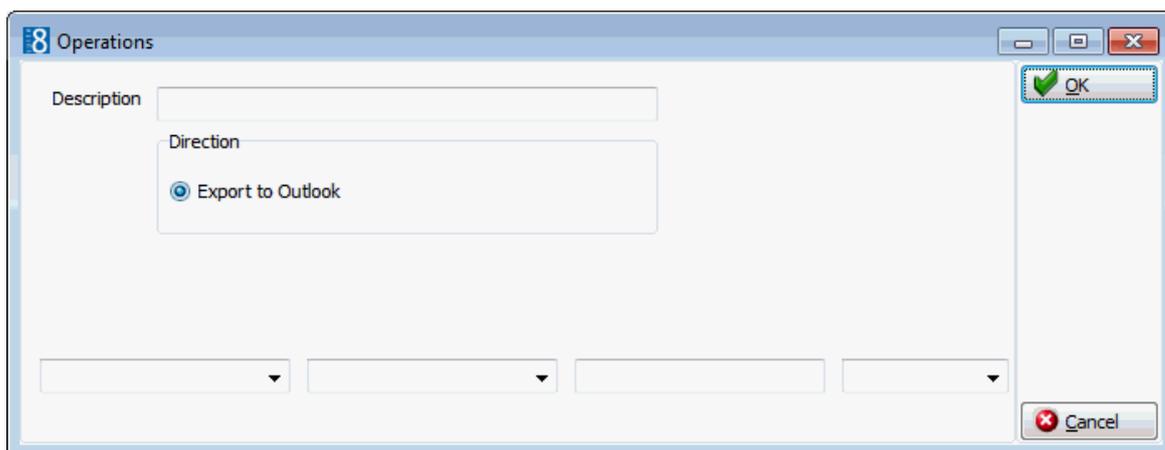
Note: Depending on the Folder Type, different fields will be available when defining exports under NEW OPERATION.

New Folder dialog box

Field	Definition	Legal Values
System User Name	The name of MS Outlook User.	Will be taken from outlook and must be completed on each workstation, for each user.
Description	Describes the contents of the folder.	Enter a valid description.
Pick Outlook Folder	Defines the MS Outlook folders.	Select the required outlook folder from folder list.
Folder Type	Defines the folder type.	Select from Profiles, Tasks, Activities or Notes.
Notes Folder	Select the folder created for notes.	Select from list box.

How to create a new operation

1. On the SETUP menu select CONFIGURATION to display the configuration options.
2. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
3. Click FOLDERS to display the Folders screen.
4. Select the required folder and click NEW OPERATION.
The Operations dialog box is displayed.



5. Enter a DESCRIPTION for the operation.
6. The direction EXPORT TO OUTLOOK is automatically selected.
7. Select the fields, operators and enter values as required. Combinations of and/or may be entered.
8. Click OK to save the operation.

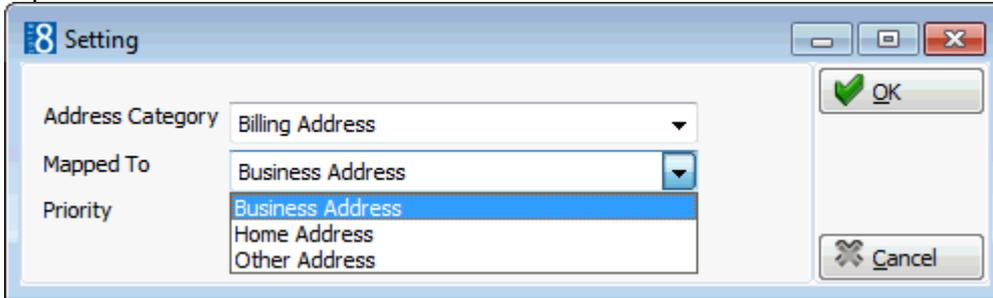
New Operation dialog box

Field	Definition	Legal Values
Description	The description of the operation.	Enter a valid description.
Direction	The type of export operation.	EXPORT TO OUTLOOK selected by default.
Field List	Defines the fields for the export. The list of available fields is dependant on the Folder Type.	Select from list box.
Operators	Defines the operator to be used such as, equal, not equal, less than, greater than, is empty, etc.	Select an operator.
Values	The valid options are displayed. The choices depend on the type of field selected.	Enter or select a valid option.
And/Or	Specifies the logical operator for the next connection.	AND – the first condition and the next condition must both be true. OR – either the first or the second condition must be true. BLANK – no logical operator selected.

 The folders and export operations are defined via the option Folders under Setup → Configuration → Miscellaneous → Export to Outlook.

Settings

The address and communication type mappings to MS Outlook folders are defined via the option SETTINGS in the configuration. It is possible to map one or more Version 8 address or communication types to an MS Outlook address or communication type; however, all Suite8 address or communication types must be mapped otherwise information will be lost during the export.



Address and Communication Categories dialog box

Field	Definition	Legal Values
Address Category	The address or communication type.	Select from list box.
Mapped to	MS Outlook address or communication type to be mapped to.	Select from list box.
Priority	If more than one Suite8 address type is linked to the Outlook address type, the priority defines which one gets used.	Integer between 0 and 99.

How to set an address or communication type mapping

1. Select the address or communication type category.
2. Click EDIT.
3. In the MAPPED TO box click the drop-down arrow, and select the address to be mapped to.
4. In the PRIORITY box enter a priority number between 0 and 99.

 The address and communication type mappings to MS Outlook folders are defined via the option Settings under Setup → Configuration → Miscellaneous>Export to Outlook.

 The address and communication types are defined via the options Address Types and Communication Types under Setup → Configuration → Customer Relationship Management.