

Benefits:

- Integrates Microsoft Outlook with Navision Financials Contact Management.
- Maintain Contacts in Outlook or Navision Financials.
- Create Appointments and Activities in One Place.
- Flexibility to Develop Additional Integration between Outlook and Financials.

Outlook Integration Suite for Navision Financials

Version 2.01

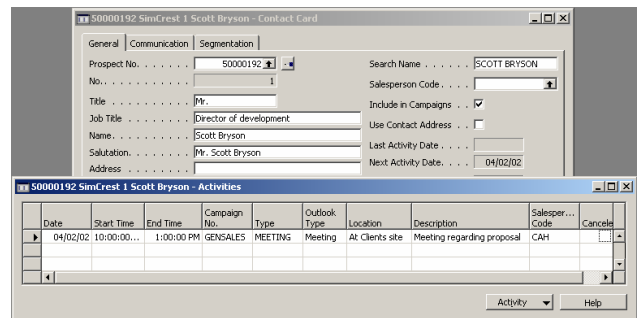
This product suite integrates Navision Financials Contact Management with Microsoft Outlook®. Data is automatically retrieved and sent from Financials to Outlook, and visa versa. In other words, this is a true two-way integration. Changes can be made in either application and reflected in the other.

The suite integrates the following:

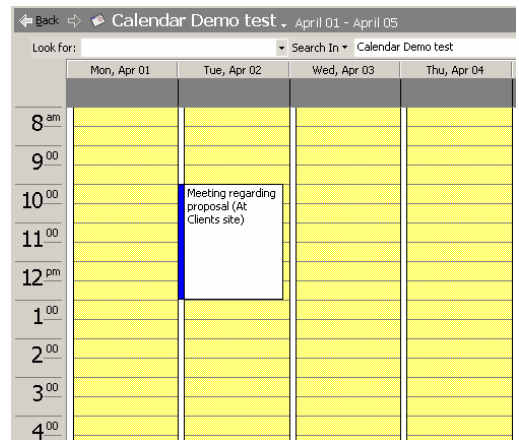
- Outlook Calendar with Financials Activities (Meetings)
- Outlook Tasks with Financials Activities
- Outlook Contacts with Financials Prospects/Contacts

Here's How it Works

For example, a salesperson enters an activity in a contact card in Financials. Information like the date, time, and duration of the to-do is entered in the activity. After finalizing the activity in Financials, the appointment is automatically entered into both Financials and the relevant Outlook calendar.



If the activity is a Meeting, it will go into the Outlook calendar, as was just described. If the activity is a Phone Call it will go into Outlook Tasks. All information relating to the activity (Meeting or Phone Call) is pushed into Outlook - the salesperson now need only go to one place to find the required information.



Truly Two-Way

Continuing with the example: if the meeting is rescheduled in Outlook (dragged, etc.) it will automatically be changed in Financials. Similarly, if it is changed in Financials, the resulting change will be reflected in Outlook. Either place will have the correct information!



Requirements

The Outlook Integration Suite has the following requirements:

- Navision Financials version 2.6 or later
- Microsoft Outlook version 2000 or later

The following Navision Financials granules are required:

- Contact Management - Basic
- Contact Management - Activities

No technical granules are required.

A Navision Attain version is also available.

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