



## USING RHOLINK03

This article will help you understand and use RHOLink03: the RedHorse CRM Outlook Link for Microsoft Office 2003. Please see a separate article for more information about installing or updating RHOLink.

Please see separate help articles for information about RHOLink07: the RedHorse CRM Outlook Link for Microsoft Office 2007 and RHOLink10: the RedHorse CRM Outlook Link for Microsoft Office 2010.

## Prerequisites

RHOLink is compatible with the Standard and Real Estate version of RedHorse CRM. If you are using the Express version, you must upgrade before you may use the Outlook Link.

RHOLink03 is compatible with Microsoft Office 2003. A separate installer is available for each version of Outlook. You must install the correct version of the link for the version of Outlook that you are using.

It is not necessary to have RedHorse CRM running on the machine where Outlook is installed. It is only necessary to have access to the path (local, network or VPN) where RedHorse CRM is installed.

## Link Capabilities

RHOLink synchronizes several types of items between Outlook and RedHorse CRM:

- **1-Way Contact Syncing** - RHOLink can synchronize contacts one way: from RedHorse to Outlook.
- **1-Way Email Syncing** - RHOLink can synchronize emails one way from Outlook to RedHorse.
- **2-Way Calendar Syncing** - RHOLink can synchronize appointments and activities two ways: from RedHorse to Outlook and from Outlook to RedHorse.
- **2-Way Task Syncing** - RHOLink can synchronize tasks two ways: from RedHorse to Outlook and from Outlook to RedHorse.

## Link Options

The options that control how RHOLink synchronizes items between Outlook and RedHorse CRM are found in Outlook by opening the Tools menu, then clicking Options and the RedHorse Outlook Link Tab. These settings should be reviewed before using RHOLink.

Settings available from within RedHorse CRM in User Maintenance in the Admin Center or in User Preferences apply only to RHOLink07 and RHOLink10. They do not apply to RHOLink03. Link Options for RHOLink03 must be set in Outlook.

There are four tabs with settings in the Options dialog:

### **Login Information**

The Login Information tab has settings that specify the login credentials for the RedHorse CRM installation and user that will be syncing with Outlook.

- **Installation Path** - the path where the installation of RedHorse CRM is located. Valid options include:
  - A local path where RedHorse CRM is installed
  - A shared path on a network to which the workstation is connected
  - A shared path accessible via a VPN connection to the server where RedHorse CRM is installed.
- **Username** - the RedHorse user that will be syncing with this Outlook
- **Password** - the password used to log into RedHorse by the user specified.

### **Contacts**

The Contacts tab has settings that specify how contacts will synchronize from RedHorse CRM to Outlook.

- **Syncing Method** - which contact records will sync. The choices are:
  - **All Contacts** - sync all contacts from RedHorse to Outlook.
  - **Outlook Contacts Group** - use a contact group in RedHorse to sync contacts with Outlook. Syncing a group requires a group named "Outlook Contacts." Each user who will be using RHOLink and syncing by a group must have their own Outlook Contacts group.

In RedHorse, you can create the group manually by clicking the Filters toolbar button in RedHorse to open the Queries and Groups window. Follow the CRM help instructions to create a query of the desired contacts and convert the query to a group.

Whether syncing by group or all contacts, only contacts that are accessible by a user will sync to Outlook. Contacts that the user cannot access because of curtaining will not sync to Outlook.

### **Email**

The Email tab has settings that specify how email will synchronize between RedHorse CRM and Outlook.

- **Auto link emails for contacts synced from CRM** - specifies how emails are synced for RedHorse contacts. The choices are:
  - **Always** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is linked to a contact that was synced from RedHorse, the email message will be automatically sent to RedHorse. No user intervention is required for the sync to occur.
  - **Never** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is linked to a contact that was synced from RedHorse, the email message will NOT be automatically sent to RedHorse. To sync the email to RedHorse, the user would have to use the Link Email button in the RHOLink toolbar in Outlook.
  - **Ask** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is linked to a contact that was synced from RedHorse, the email message will NOT be automatically sent to RedHorse. The user will be notified that an email has been sent or retrieved, that it is linked to a RedHorse contact, and asked whether they wish to copy the email to RedHorse. If they choose Yes, the email will be sent to RedHorse. If they choose No, the email will not be sent to RedHorse. To sync the email at a later time, the user would have to use the Link Email button in the RHOLink toolbar in Outlook.
  
- **Auto link emails for contacts NOT synced from CRM** - Specifies how emails are synced for contacts that were NOT synced from RedHorse. When the user chooses to sync emails that are not linked to RedHorse contacts, they will be asked whether they want to add a new contact to RedHorse. If they chooses Yes, a new contact will be added to RedHorse, the email will be linked to the new contact, and the contact will be added to the Outlook Contacts group in RedHorse. The user will be reminded to then sync contacts to complete the sync process between RedHorse and Outlook. When syncing emails NOT linked to RedHorse contacts the choices are:
  - **Always** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is NOT linked to a contact that was synced from RedHorse, the email message will be automatically sent to RedHorse. The user will be asked whether they want to add a new contact to RedHorse.
  - **Never** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is NOT linked to a contact that was synced from RedHorse, the email message will NOT be automatically sent to RedHorse. To sync the email to RedHorse, the user would have to use the Link Email button in the RHOLink toolbar in Outlook, at which time the user will be asked whether they want to add a new contact to RedHorse.
  - **Ask** - Whenever an email is sent or retrieved in Outlook and the To: email address or the From: email address is NOT linked to a contact that was synced from RedHorse, the email message will NOT be automatically sent to RedHorse. The user will be notified that an email has been retrieved, that it is NOT linked to a RedHorse contact, and asked whether they wish to copy the email to RedHorse and create a new contact. If they choose not to sync the email, the email will

not be sent to RedHorse. To sync the email at a later time, the user would have to use the Link Email button in the RHOLink toolbar in Outlook.

- **Save attachments to disk when linking emails** - Specifies how attachments are handled in RedHorse when emails are synced between RedHorse and Outlook. The choices are:
  - **Always** - Whenever an email is synced to RedHorse and the email has an attachment, the attachment will be automatically sent to RedHorse and saved using the document management settings for RedHorse. No user intervention is required and the attachment will be found on the linked email in RedHorse. The attachment will also remain available in Outlook.
  - **Never** - Whenever an email is synced to RedHorse and the email has an attachment, the attachment will NOT be automatically sent to RedHorse. When viewing the email in RedHorse, no attachment will be seen but it will remain available in Outlook.
  - **Ask** - Whenever an email is synced to RedHorse and the email has an attachment, the attachment will NOT be automatically sent to RedHorse. The user will be notified that an email has been synced to RedHorse, that it has an attachment, and asked whether they wish to copy the attachment to RedHorse. If they choose Yes, the attachment will be sent to RedHorse and saved using the document management settings for RedHorse. If they choose No, the attachment will not be sent to RedHorse. In both cases, the attachment will remain available in Outlook.
- **Remove attachments from Outlook and replace with link to saved file** - Specifies how attachments are handled in Outlook when attachments are synced between RedHorse and Outlook. Whenever an email is synced to RedHorse and the email has an attachment and the attachment is sent to RedHorse, if this option is checked the attachment will be removed from Outlook. When viewing the email in Outlook the user will find a link to the file saved in the document management structure in RedHorse. This setting helps reduce the size of the Outlook files. If this option is not checked, the attachment will remain within the email message in Outlook.

Emails sync one-way from Outlook to RedHorse. Emails sent from or retrieved in the RedHorse internal email client will not sync back to Outlook.

## Calendar

The Calendar tab has settings that specify how calendar items will synchronize between RedHorse CRM and Outlook. Only calendar items linked to RedHorse contacts that have been synced to Outlook are synced to Outlook. Only calendar items linked to primary contacts from RedHorse are synchronized to Outlook. Calendar items linked to additional Contacts are not synchronized. Only calendar items created in Outlook that are linked to RedHorse contacts are synced to RedHorse. Calendar items created in Outlook that are not linked to RedHorse contacts will not sync to RedHorse. The settings on the Calendar tab are:

- **Syncing Method** - How calendar records will sync. The choices are:
  - **One-Way** - Calendar items will sync only from RedHorse to Outlook. Changes in Outlook will not sync back to RedHorse.
  - **Two-Way** - Calendar items will sync both from RedHorse to Outlook and from Outlook back to RedHorse. Calendar items may be created or edited in either application and changes will sync between them when the RHOLink Sync Calendar toolbar button is clicked.
- **Sync calendar deletions from Outlook to CRM** - When checked, this option will cause calendar items in RedHorse to be deleted when they are deleted from Outlook. When unchecked, deleting a calendar item will not cause the item to be deleted from RedHorse.

All calendar settings here also apply to Tasks in Outlook.

## Link Buttons

RHOLink adds a toolbar to Outlook with buttons that you can use to sync items between RedHorse CRM and Outlook.

### **Sync Contacts**

Clicking this button in the RHOLink toolbar will sync contacts from RedHorse to Outlook. The contact records will be added to the default Outlook Contacts Personal Address book.

Only primary contacts from RedHorse are synchronized to Outlook. Additional Contacts are not synchronized.

The contacts synchronized are determined by the Contacts tab setting in the Outlook Tools, Options, RedHorse Outlook Link Tab, Contacts Tab. The choices are All Contacts or contacts in the Outlook Contacts Group.

### **Sync Calendar**

Clicking this button in the RHOLink toolbar will sync Calendar items from RedHorse into Appointment and Task items in Outlook. The calendar and task records will be added to the default Outlook Personal Calendar.

Only calendar items linked to contacts that are synced to Outlook from RedHorse are synced. Only calendar items linked to primary contacts in RedHorse are synchronized to Outlook. Calendar items linked to additional Contacts are not synchronized. Only calendar items created in Outlook that are linked to RedHorse contacts are synced to RedHorse. Calendar items created in Outlook that are not linked to RedHorse contacts will not sync to RedHorse.

Which calendar items are synchronized to and from Outlook are determined by the Calendar tab settings in the Outlook Tools, Options, RedHorse Outlook Link Tab, Calendar Tab. The choices are One Way (RedHorse to Outlook Only) or Two-Way (Changes in Outlook sync back to RedHorse). See Link Settings for more information.

## Link Email

Clicking this button in the RHOLink toolbar will manually sync an email from Outlook into RedHorse. You may select one or more emails at a time when using this button and RHOLink will attempt to link all selected emails. If the email address is not linked to a contact synced from RedHorse, the user will be asked whether they want to add a new contact record to RedHorse.

Automatic email linking is controlled by the RHOLink settings. See Link Settings for more information.

## Unlink Email

Clicking this button in the RHOLink toolbar will unlink an email that was previously linked to RedHorse from Outlook. You may select one or more emails at a time when using this button and RHOLink will unlink all selected emails. Emails that are automatically linked to RedHorse or manually linked may be unlinked. When unlinking an email, the email will be deleted from RedHorse but will remain in Outlook as an unlinked email. It may be re-linked to RedHorse again if desired. When unlinking an email, the contact record will not be removed from RedHorse or from the RedHorse Outlook Contacts group.

## Syncing Contacts

Syncing contacts is performed by using the Sync Contacts button in the RHOLink toolbar. The contact records will be added to the default Outlook Contacts Personal Address book. Only primary contacts from RedHorse are synchronized to Outlook. Additional Contacts are not synchronized.

Which contacts are synchronized is determined by the setting in Tools, Options, RedHorse Outlook Link Tab, Contacts Tab. The choices are All Contact Records or Outlook Contacts Group. See Link Settings for more information.

The fields that are synchronized include the primary address, primary phone and primary email for the contact. Field mapping is as follows:

RedHorse Field	Outlook Field
Company	Company
Contact	Full Name

<b>Primary Address Address1</b>	Business Address Street
<b>Primary Address City</b>	Business Address City
<b>Primary Address State</b>	Business Address State
<b>Primary Address Zip</b>	Business Address Zip
<b>Primary Phone</b>	Business Phone
<b>Primary Email</b>	Email

User defined fields are also added to Outlook to identify the records synced from RedHorse. The following fields are added to Outlook:

- **ContactRecid** - The RedHorse unique record identifier for the contact record.
- **Linked to CRM** - A checkbox identifying records that are synced from RedHorse.

Contacts sync one-way from RedHorse to Outlook. Changes made to contacts in Outlook will not sync back to RedHorse and will be overwritten the next time contacts are synced. It is recommended to make changes to contacts in RedHorse first and sync those changes to Outlook.

When records are synced, the following steps occur:

1. All contacts found in Outlook that are linked to RedHorse are removed.
2. All appropriate contacts are read from RedHorse and added to Outlook.

## Syncing Calendar

Syncing calendar items is performed by clicking the Sync Calendar button in the RHOLink toolbar. The calendar and task records will be added to the default Outlook Personal Calendar. Only calendar items linked to contacts that have been synced to Outlook will sync to the Outlook Calendar and Tasks. Only calendar items linked to primary contacts in RedHorse are synchronized to Outlook. Calendar items linked to additional Contacts are not synchronized. Only calendar items created in Outlook that are linked to RedHorse contacts are synced to RedHorse. Calendar items created in Outlook that are not linked to RedHorse contacts will not sync to RedHorse.

How calendar items are synchronized is determined by the setting in Tools, Options, RedHorse Outlook Link Tab, Calendar Tab. The choices are One Way (RedHorse to Outlook Only) or Two-Way (Changes in Outlook sync back to RedHorse). See Link Settings for more information.

The following calendar items are synced from RedHorse to Outlook and match with a corresponding record type and category in Outlook:

RedHorse Calendar Record	Outlook Record Type	Outlook Category
<b>Appointment</b>	Appointment	Appointments
<b>Call</b>	Appointment	Calls
<b>Next Action</b>	Appointment	Next Actions
<b>Event</b>	All Day Appointment	Events
<b>To Do</b>	Task	To Dos

The Appointment fields that are synchronized include the following:

RedHorse Field	Outlook Field
<b>"Appointments", "Calls", "Next Actions", "Events"</b>	Categories
<b>Reference</b>	Subject
<b>Date and Time</b>	Start Date and Time
<b>Duration</b>	End Date and Time less Start Date and Time
<b>Alarm Flag</b>	Reminder
<b>Alarm Date</b>	Start Date less Reminder Minutes
<b>Notes</b>	Notes

The Task fields that are synchronized include the following:

RedHorse Field	Outlook Field
"To Dos"	Categories
Reference	Subject
Alarm Flag	Reminder
Alarm Date	Reminder Date and Time
Notes	Notes

User defined fields are also added to Outlook to identify the Calendar records synced from RedHorse. The following fields are added to Outlook:

- **ContactRecid** - The RedHorse unique record identifier for the contact record.
- **CalRecid** - The RedHorse unique record identifier for the calendar record.
- **Linked to CRM** - A checkbox identifying records that synced from RedHorse.

New calendar and task items that are added to Outlook may be synced to RedHorse if they are first linked in Outlook to a contact that was synced from RedHorse. To link a calendar or task item to a RedHorse contact, first create a new appointment or task item in Outlook. Then use the Contacts button to select a contact from the Outlook Personal Address Book. Only one link to one contact will be synced to RedHorse. If the Contacts button is not visible on the Outlook dialog, see Customizing Outlook Views for help in displaying this field in Outlook.

Neither Outlook or RedHorse track field level changes to calendar records. This applies to both Appointments and Tasks. When records are synced, the following steps occur:

1. If deletions are synced, any items deleted from Outlook that were synced to RedHorse are removed from RedHorse.
2. If two way syncing is selected, items in Outlook are compared to RedHorse.
  - a. An item synced from RedHorse to Outlook is compared to see if the update date in Outlook is more recent than the update date in RedHorse. If the Outlook record has been modified more recently than the RedHorse record, RedHorse will be updated with the changes. Any changes

that were made in RedHorse and that were not synced to Outlook will be lost. All fields in RedHorse will be updated with the data in Outlook.

- b. An item that was created in Outlook and linked to a RedHorse contact is added to RedHorse.
  - c. Then the item is removed from the Outlook Calendar.
3. All appropriate calendar items are read from RedHorse and added to Outlook.

## Customizing Outlook Views

### User-defined Fields

By default Outlook will not display the user defined fields which indicate that an item is linked to RedHorse. To display these fields, use the following steps:

1. Select the appropriate Outlook folder (Contacts, Calendar, Tasks, or Mail).
2. Open the View menu, go to Current View, and select Customize Current View. This will open the Customize View dialog.
3. Click the Fields button. This will open the Show Fields dialog.
4. In the "Select available fields from" field, select "User-defined fields in folder."
5. In the "Available fields" column, select the appropriate RedHorse field from the list and use the "Add" button to add it to the "show these fields in this order" column.
6. Use the Move Up and Move Down buttons to order the fields as desired.
7. Click OK to save changes.
8. Click OK again to close the Customize View dialog.

### Linked Contact

Outlook does not by default show the contact that is linked to a calendar or task item. To display and select a contact to link to a calendar or task item, use these steps:

1. In the Outlook menu, go to Tools, Options and select the Preferences Tab.
2. In the Contacts and Notes section, click the Contact Options button. This will open the Contact Options dialog.
3. In the Contact Linking section, check the box "Show Contact Linking on all Forms".

4. Click OK to save changes.
5. Click OK to close the Options dialog.

## Link Limitations

**Email Merging:** Although it is possible to send individual emails in RedHorse using the Outlook email dialog, merging emails to multiple contacts in RedHorse requires the internal email client in RedHorse. Using the Actions, Merge Email toolbar option in RedHorse will send with emails using the internal email client only.

**Email Templates:** Using email templates to merge contact information into an email body requires using the internal email client in RedHorse.

**Email Rules:** Email rules in Outlook, if configured, will run when sending email out of Outlook and retrieving email into Outlook. Email rules configured within the email center in RedHorse CRM will not be activated when email is synced from Outlook to RedHorse CRM using RHOLink.

**Linking Emails to Multiple Contacts/Business Modules:** Emails synced from Outlook to RedHorse CRM using RHOLink will be automatically linked to the primary sender or recipient contact record. Add additional links to contacts and business modules by opening the email in RedHorse CRM after syncing through RHOLink and using the Links box at the bottom of the View Email dialog.

**Web Import:** Web Import emails that are retrieved in Outlook and synced to RedHorse CRM using RHOLink will not trigger a web import function. The web import may be triggered by opening the email in RedHorse CRM after syncing through RHOLink and using the Web Import button on the View Email dialog.

Please contact support if you experience any issues during the use of RHOLink.

[support@redhorsesystems.com](mailto:support@redhorsesystems.com)

[www.redhorsesystems.com](http://www.redhorsesystems.com)