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1 Introduction

This document will guide you through the Farmers WIFE Sync feature, with which you are able to sync selected items between Farmers WIFE and Microsoft Outlook® (PC). For information regarding syncing to iCal on MAC, please consult the document 'Sync_module_Mac'.

The Sync feature syncs Contacts, Events and To-dos between Farmers WIFE and Microsoft Outlook® on PC. Syncing an object (e.g. a contact) means that the Sync feature creates the contact in all synced programs (ex. Farmers WIFE and Microsoft Outlook®) and tracks the unique ID of that contact in all programs. When a contact is modified (e.g. first name, last name, email address etc.), the Sync feature will ensure that the information is updated in all other programs as well. The programs involved in the sync process share the same information about the synced objects.

- A Contact is the equivalent of a Farmers WIFE "contact" and a Microsoft Outlook® "contact".
- An Event is the equivalent of a Farmers WIFE "Task" or "Booking" and a Microsoft Outlook® "Appointment".
- A To-do is the equivalent of a Farmers WIFE "To-do" and a Microsoft Outlook® "Task".

The Sync List is the internal look-up-table that Farmers WIFE uses to e.g. connect a contact in Farmers WIFE to its corresponding contact in Microsoft Outlook®. Any object not in this sync list will not be synced.



It is important that the computer clock is set to the correct time otherwise the sync feature cannot determine correctly the most recent objects between the ones on the Farmers WIFE server and on your computer.

2 Access the Sync feature

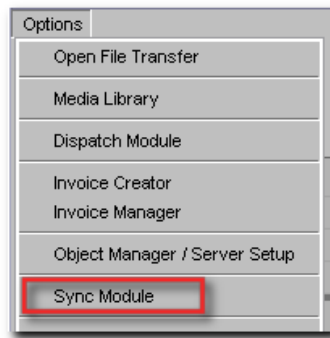
User Permissions

To be able to access and use the Sync module, the according Permission access must be set to Yes.



Additionally if the permission Two-Way Sync is set to Yes, the option '[Export-Only Sync](#)' will be available for the user to decide whether to export only from Farmers WIFE to Microsoft Outlook® or to export into Farmers WIFE from Microsoft Outlook®.

The Sync feature is accessed from the "Options" menu in the top left corner of the Farmers WIFE Client application:



When accessing the Sync Feature, Microsoft Outlook® will show the following warning dialog: "A program is trying to access email addresses you have stored in Outlook®. Do you want to allow this?".

Click "Allow access for x minutes". Should you prefer to install a program which automatically dismisses this dialog, you can download one here:

<http://www.express-soft.com/mailmate/clickyes.html>.

Clicking "No" in the warning dialog will abort the sync process.

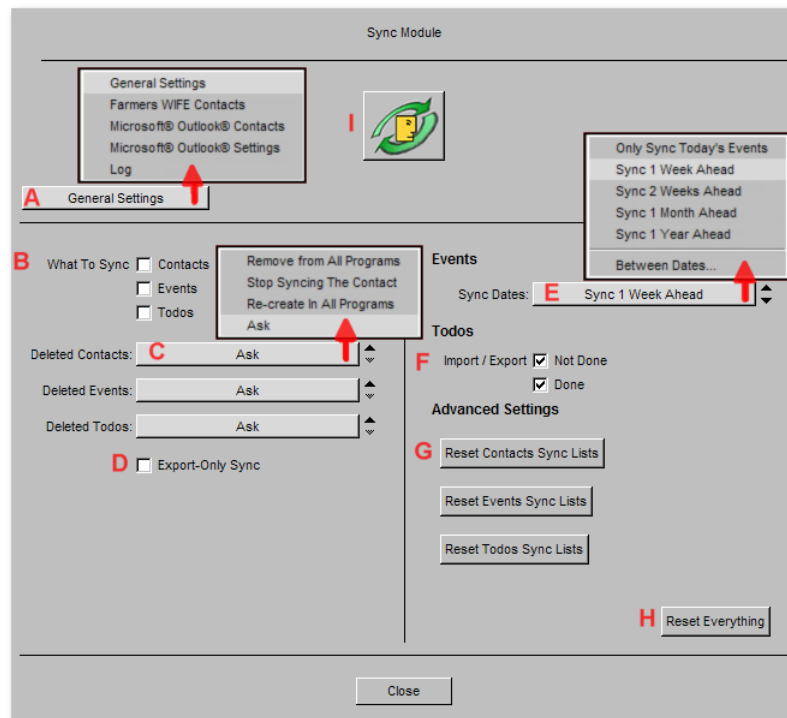


3 Configure the Settings

The Sync Module consists of several panes which allow you to configure the sync process according to your needs.

3.1 General settings

The initial window of the Sync feature gives the user access to all of the general settings, configurable on the bottom right and left hand side of the screen. Clicking on the tab labeled "General Settings" will display submenu options for the following: Farmers WIFE Contacts, Microsoft Outlook® Contacts, Microsoft Outlook® Settings, as well as the Sync Log.



Selector

A Selector for:

- The General settings pane
- The Farmers WIFE Contacts pane
- The Microsoft Outlook® Contacts pane
- The Microsoft Outlook® Settings pane
- The Log pane.

General Settings

B What to Sync: Choose the type of objects to be synced: Contacts, Events, To-dos. Only checked items will be synced.

C Deleted Contacts/Events/Todos: These settings determine what action is to be taken when an object is deleted in Farmers WIFE or in Microsoft Outlook®:

- "Remove From All Programs": the object will automatically be removed from all programs that share the object.
- "Stop Syncing The Contact/Event/To-do": the object will continue to exist in all programs where it was not deleted, but it will not be synced.
- "Re-Create In All Programs": the object will be recreated in the programs where it was deleted, using the most recent version found.

D Export-Only Sync: With this option, the Sync module will search for new items only in Farmers WIFE.

E Sync Dates for Events: Indicate the time range for syncing new events (Farmers WIFE Tasks / Outlook® Appointments). Provided that you have chosen to sync "Events" in setting "B", all events within this time range will be synced. Events outside of the indicated time range (e.g. old events) will not be synced. Outlook® Appointments will be created as Farmers WIFE Tasks.

F Import/Export Done/Not Done To-dos: By default, only Farmers WIFE To-Dos labeled as "Not Done"

are added to the sync list. This option allows you to also sync “done” Farmers WIFE To-dos.



If the “Done” option is left unchecked, a To-Do labeled as “Not Done” will continue being synced even once it’s set to “Done”. This is due to the fact that Farmers WIFE only ‘remembers’ the first status of the To-Do.

G Advanced Settings: Reset Contacts/Events/Todos Lists: These buttons should only be used if the sync lists have become corrupted.




Using these buttons will cause the Sync feature to lose track of which objects correspond to which in the different programs!


H Advanced Settings: Reset Everything: This button will erase all sync lists (see G) and reset all settings to their default values.

I Sync now. Click here to initiate the sync process.

3.2 Farmers WIFE Contacts

Both Farmers WIFE and Outlook® handle contacts. The contact lists from each program are available in the Sync feature. Through the lists, you can select which Farmers WIFE contacts to sync to Outlook®.

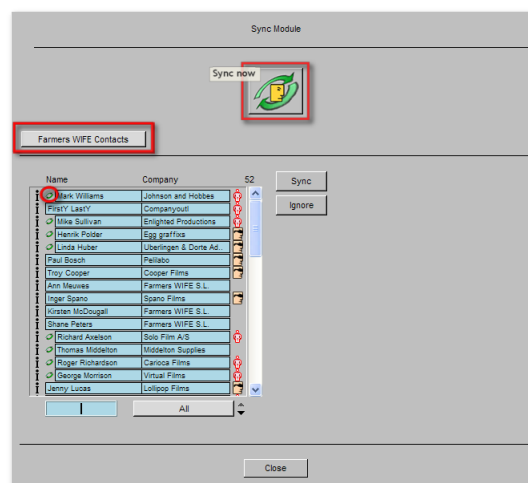
To prepare your WIFE contact list to be synced, select one or more contacts and then press the Sync button. A small icon  will appear before each selected contact.


If you wish to omit a contact from the sync list, simply remove the  icon next to that contact, by selecting the contact and clicking the Ignore button.



Farmers WIFE Contacts can be filtered to quickly show ALL contacts or a specific category (Clients, Resources, Globals, Privates).

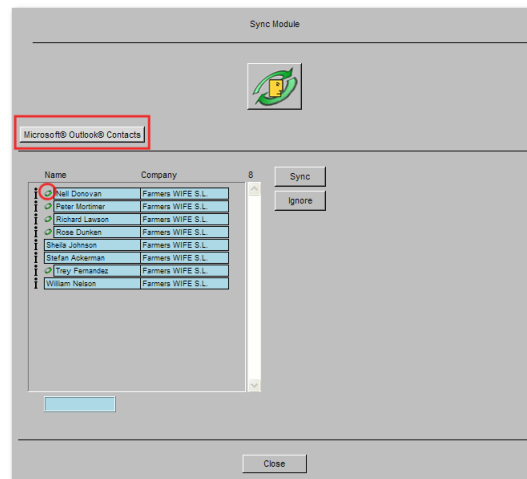
The steps above are just a preparation for the actual syncing. Your contacts will not be synced until you press the *Sync now* button.



Clicking on the  icon next to each contact, displays the current information available for the contact.

3.3 MS Outlook® Contacts

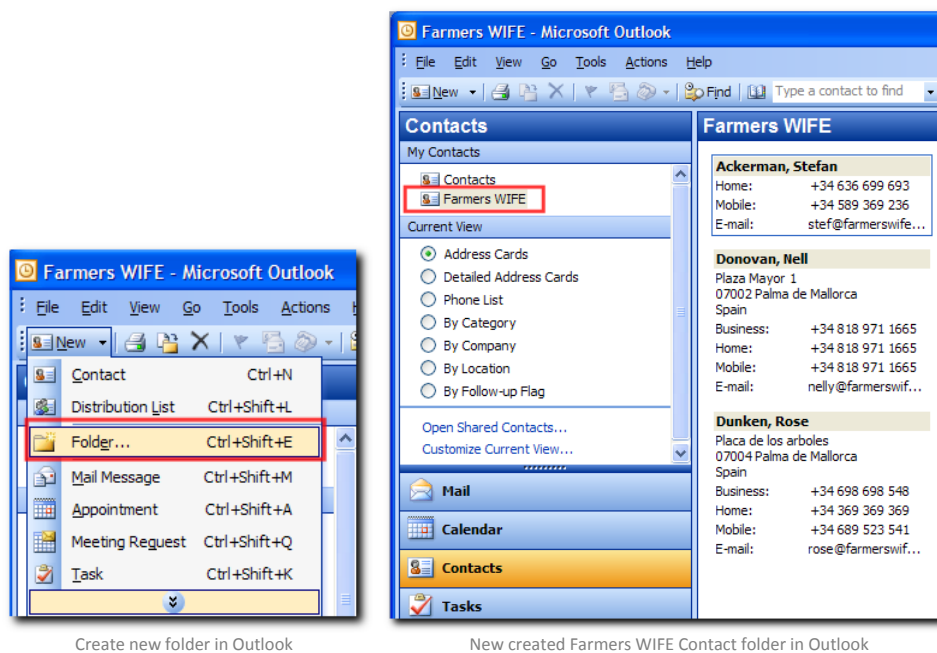
If you wish to do a two-way sync, e.g. syncing your Outlook® contacts to WIFE, you will need to prepare the list of Microsoft Outlook® contacts following the same steps as in the chapter before.



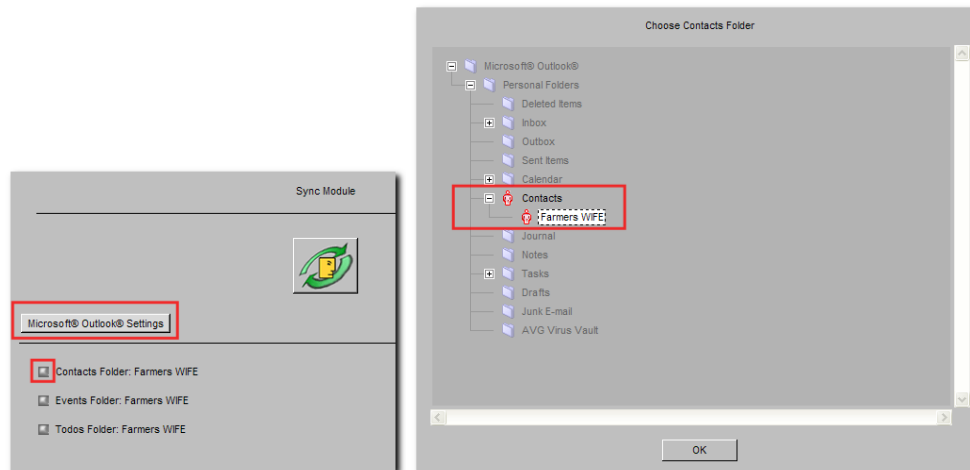
3.4 MS Outlook® Settings

These settings are required to configure the folders Farmers WIFE will sync with for each category: Contacts, Events and To-dos. Before doing so however, you will need to configure the folders in Outlook®.


Go to Outlook® Contacts. Create a folder called 'Farmers WIFE' to sync all your Farmers WIFE contacts with. The main contact folder will not be affected.



In the Farmers WIFE, click on the box next to Contacts Folder in the Sync feature. The dialog 'Choose Contact Folder' will appear. Select the folder you just created and click "OK". Follow the same procedure for Events and To-Dos.

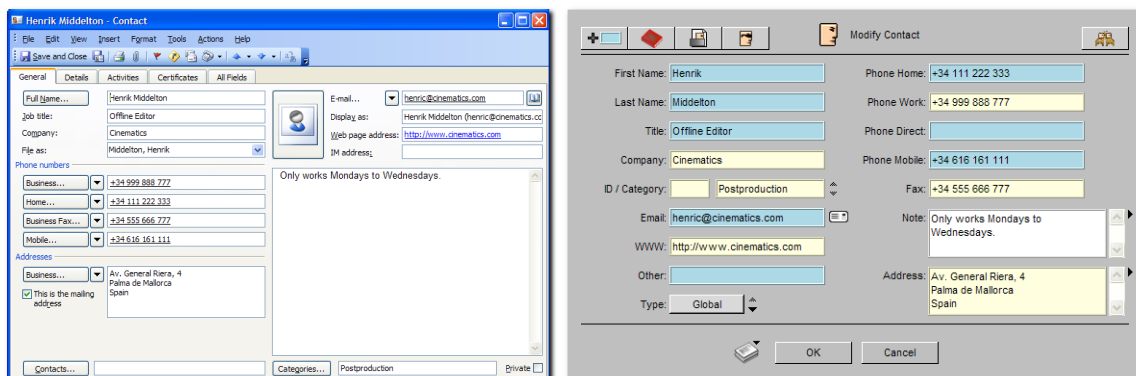


4 Sync Now

After the proper settings have been configured, and you've selected your contacts, press the "Sync Now" button to start the syncing process. The syncing process is not automated. You will need to click the "Sync Now" button each time that you want to sync. 

Sync Contacts

When syncing a contact from Outlook® to Farmers WIFE, the contact is by default created as the contact type 'Globals'. Naturally, the category can be modified to "Client", "Resource" or "Private", later in Farmers WIFE. Here is an example:

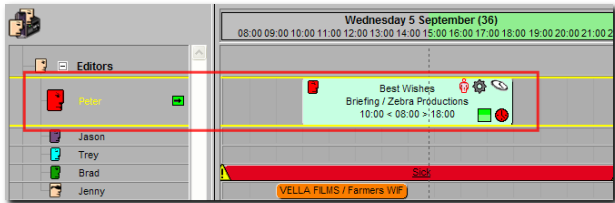


Outlook contact synced to Farmers WIFE

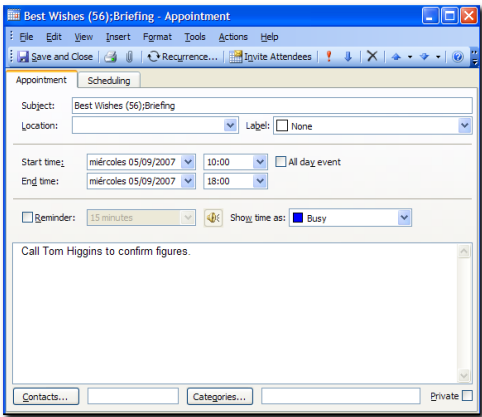
Farmers WIFE contact synced from Outlook

Sync Dates for Events

When syncing a Booking/Task from Farmers WIFE to Outlook®, an Appointment is created in Outlook® which displays the Booking name (only Farmers WIFE Advanced), the Project name and the Note field, if any.



Booking Synced from Farmers WIFE

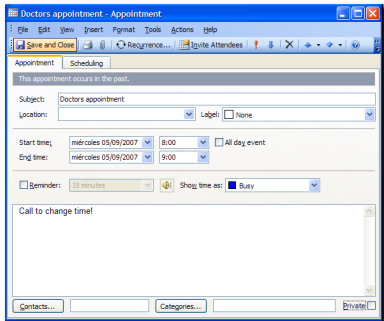


Booking Synced to Outlook

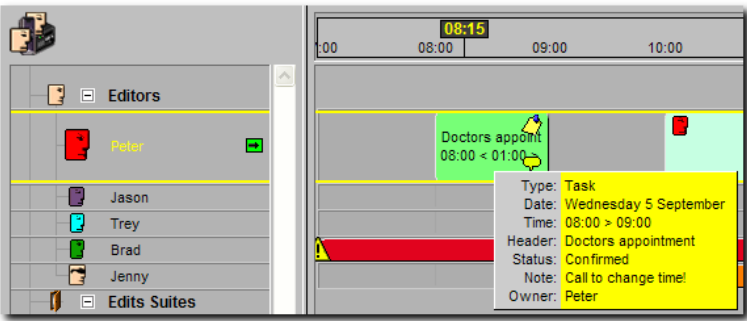


Note that only Bookings or Tasks where your user is scheduled will be synced to your calendar.

When syncing an Appointment from Outlook® to Farmers WIFE, a Task is created in Farmers WIFE:



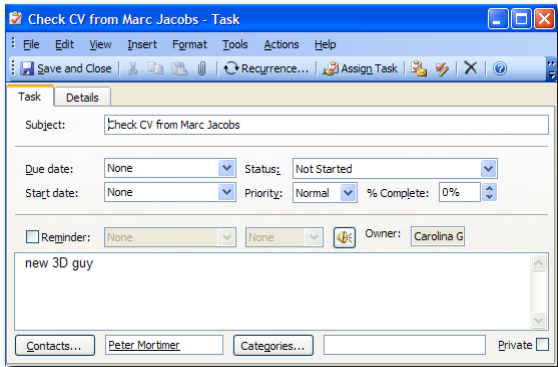
Sync an Appointment from Outlook to Farmers WIFE



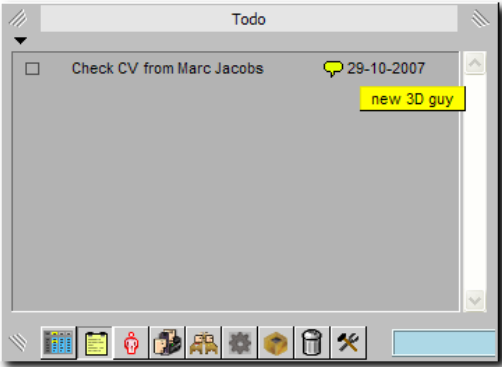
New Task in Farmers WIFE synced/created from an Appointment in Outlook

Import/Export Done/Not Done Todos

A Farmers WIFE To-Do, is called a “Task” in Outlook®. When synced to Outlook®, the Farmers WIFE To-Do will look like the example below at right.



Farmers WIFE To-Do synced to Outlook



To-Do in Farmers WIFE



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