

## 1 Introduction/Overview

This article looks at how Outlook can be used as a front-end Contact Management system for a back end-CRM or ERP system, without the installation of any additional client software or Outlook Add-Ins.

## 2 The Emergence of the Mobile Sales Professional

The last few years have seen a dramatic surge in the use of mobile devices amongst salespeople, and business people in general. The need for having detailed information available to you wherever you happen to be, is increasing all the time. Initially the focus centered around the use of notebooks and laptops to satisfy this need. Microsoft answered the challenge here for the corporate traveler with the development of Outlook 2003/2007 Cached Mode operation, along with RPC over HTTP connection back to the server (which allowed information workers to connect to Exchange Server over the Internet without using a VPN). This facility now meant you could have your e-mail and other Outlook data (contacts, appointments, etc.) available offline on your notebook and automatically synchronized whenever the notebook detected a connection back to the main office Exchange Server. Thus you could now answer e-mails, update contacts, and tasks, etc. while sitting on an aircraft, and have these details update automatically when you re-connected to your office network later, either at the office, or from anywhere an internet connection was available.

However, as cell/mobile phones and PDA's have increased in sophistication, these devices are becoming a more important source of information for the 'man (person) on the move'. Now every mobile professional seems to have a Blackberry or a Windows Mobile 6 PDA. Because people now have the basic Outlook functionality in the palm of their hand, they can:

- Access their contact information.
- Send and receive e-mail while on the move.
- Make appointments and automatically receive appointment details for appointments made on their behalf.

All changes to these items are wirelessly synchronized back to their Personal Folders in their Exchange mailbox. Consequently, changes to contact details made on the PDA are automatically and seamlessly synchronized back to their notebook Outlook system and vice versa.

## 3 Using Outlook as a Contact Management System

Any contact management application needs at least the following basic functionality:

- a) A mechanism to store and profile Contact information.
- b) A means to plan and organize appointments with those contacts, not only for yourself but other team members managing those same contacts.
- c) A means to schedule tasks and to-do's for those contacts.
- d) A mechanism to record any kind of interaction with a contact, namely meetings, phone calls, e-mail, documents, etc.
- e) Some way of storing documents sent to and received from a contact.
- f) A way to send and track e-mail communication.

With reference to the requirements list above, Outlook at least satisfies the following requirements:

- a) **A mechanism to store and profile Contact information:** The “Contacts” folder in Outlook already allows a comprehensive profile of any personal or business contact to be maintained.
- b) **A means to plan and organise appointments for those contacts:** Outlook’s calendaring facilities provide these very effectively and when coupled with Exchange Server incorporate a huge number of collaborative features that are extremely difficult for any other stand-alone CRM system to emulate or reproduce.
- c) **A means to schedule tasks and to-do’s for those contacts:** Outlook’s task management facility is excellent for this.
- d) **A mechanism to record any kind of interaction with a contact:** The “Journal” facility of Outlook contains the standard fields necessary to record phone calls, meeting, etc. with clients, and can even time such activities.
- e) **A way to send and track e-mail communication:** The Inbox and Sent Items stores inward and outward e-mails.



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However, while Outlook does have the basic foundation for solid contact management functionality, there are certain limitations of Outlook that one needs to be aware of.

## 4 Limitations of Outlook

As a contact management application however, Outlook has the following limitations:

- a) **Private Mailbox (Contacts, Appointments, etc.):** Without setting up and customising Public Folders, most users will just utilise their Private Mailbox **Contacts** folder for managing their contacts, thus limiting the sharing of that information and potentially creating massive duplication of the same data within the organisation.
- b) **Discrete, independent folders:** Most users tend to use their Outlook folders as discrete elements, i.e. because it is fairly cumbersome for users to link one item to another, (e.g. a contact to an appointment) they seldom do this. Thus it is difficult for users in the organisation to get an overall picture of all the activity occurring within the organisation against any particular company or contact. The universal objective of any CRM system however, is to provide a “single-view of all customer-related information to everyone in the organisation”.

## 5 Overcoming Outlook’s Limitations

By installing an application that synchronizes Outlook data between Exchange Server Private/Mailbox folders and a back-end SQL database, the above-mentioned limitations can be overcome.

- a) By providing two-way synchronization between a user's private Contacts folder and the corporate database, everyone is updating the same common customer list, rather than each maintaining separate 'Personal' Contacts folders that are not visible to anyone else. One still has the ability to keep certain contacts simply by not marking them with the Category that identifies to MX-Sync that a contact should be added to the corporate database.
- b) By providing automatic linking and copying of e-mails, journals, tasks and appointments to the corporate database, the whole company is informed about all important customer interactions.
- c) By linking e-mails, appointments etc. to the relevant contact(s), everyone can get a view of all activity occurring with a specific customer.

## 6 Using MX-Sync with Outlook and your Corporate Database

MX-Sync ([www.mxsync.com](http://www.mxsync.com)) is an Outlook synchronization utility which synchronizes data bi-directionally between standard Microsoft Exchange Server folders (both Private Mailboxes and Public Folders) and a Microsoft SQL Server database. So you can sync Outlook data to SQL or SQL Server data to Outlook/Exchange Server folders. MX-Sync caters for scenarios where data is being updated in either or both databases.

### 6.1 Contacts

MX-Sync will synchronize selected contacts in the SQL database to each user's Personal Contacts folder, and vice versa. So MX-Sync will update changes made by anyone on the host database back to each user's respective Contacts folder. If a user has set his or her Personal Contacts folder to sync to their PDA, then these changes will of course be automatically replicated out to their smart-phone, Windows Mobile or Blackberry device.

Likewise users can add contacts via their PDA's or Blackberry devices and flag them in such a way that when these contacts sync back to their Personal Contacts folder in Outlook, MX-Sync will automatically add them to the SQL database.

In summary:

1. Creating a contact in your Personal Contacts folder and setting a specified Category (e.g. 'MX-Sync') will create that contact in the back-end SQL database (if it does not exist already).
2. Creating or editing a contact in SQL that matches a specified filter condition (per user) will sync that contact from SQL down to the user's Personal Contacts folder in Exchange/Outlook.

### 6.2 E-Mail

MX-Sync performs server-side linking of e-mails from designated personal mailboxes to the SQL Server E-Mail Folder. So any mail that drops into the Inbox or Sent Items folder that is from or to a contact that is in the SQL Contacts folder will be automatically linked to that contact and copied to the E-Mail folder even if no Outlook/MX-Contact client is active at the time.

This 'server-side' linking of e-mails also means that e-mails sent from a user's Blackberry or PDA will automatically be copied to the E-Mail table even if that user does not have Outlook open on their machine at the office.

### 6.3 Tasks and Appointments

Tasks and Appointments will be synchronized between Exchange and SQL in the following scenarios:

1. creating an appointment/task linked to a personal contact in the Personal Contacts folder that has been synchronized to SQL will create the appointment in SQL and then link the appointment to the user, the contact and the contact's primary company.
2. creating a task/appointment (not linked to contact) but setting a specified category (e.g. 'MX-Contact') will create the task/appointment in SQL, linked to the user.
3. creating an appointment where a contact in the SQL database is invited as an 'attendee' will create the appointment in SQL and then link the appointment to the user, the contact and the contact's primary company.
4. creating a task/appointment with the e-mail address or a specified 'descriptor' in the Subject line that identifies the contact/company to which the appointment should be linked will create the appointment in SQL and then link the appointment to the user, the contact and any other entities identified by the 'descriptor'.

### 6.4 Journals

Journals will be copied from Exchange to SQL in the following scenarios:

1. creating a journal linked to a personal contact in the Personal Contacts folder that has been synchronized to SQL will create the journal in SQL and then link the journal to the user, the contact and the contact's primary company.

## 7 Summary

Microsoft's earlier promotion of Outlook as a "Personal Information Manager" created the impression amongst users that Outlook was only intended to manage one's personal contacts and was not suited as the basis for a corporate-wide Customer Management System. However in conjunction with a back-end SQL database that the majority off the office-based organization has access to, Outlook can be a powerful tool that satisfies most of the requirements for basic contact management.

The reality is that many mobile workers do not have time to record more than just the basics of their interactions with customers. And the fact that they can do this recording via the standard Contacts, E-Mail, Tasks, and Appointments functionality on their notebook via Outlook or on their Windows Mobile or Blackberry devices and have this contact information shared automatically with the rest of the company greatly enhances the organization's ability to manage their customer base efficiently.