

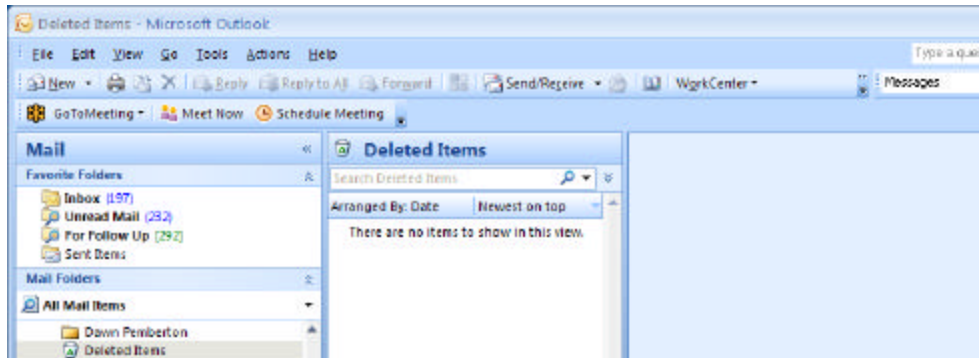
Importing-Exporting Contact Records and Calendar Items Using WorkCenterU

WorkCenterU CRM will allow the user to sync Outlook contact records and calendar items into the software database. For PDA users (Palm Pilots, Blackberry and Interactive Telephones), there is an add-on WorkCenterU module that can be purchased at a reasonable price. This add-on module will allow WorkCenterU users the ability to sync both contact and calendar information from and to WorkCenterU software and Outlook.

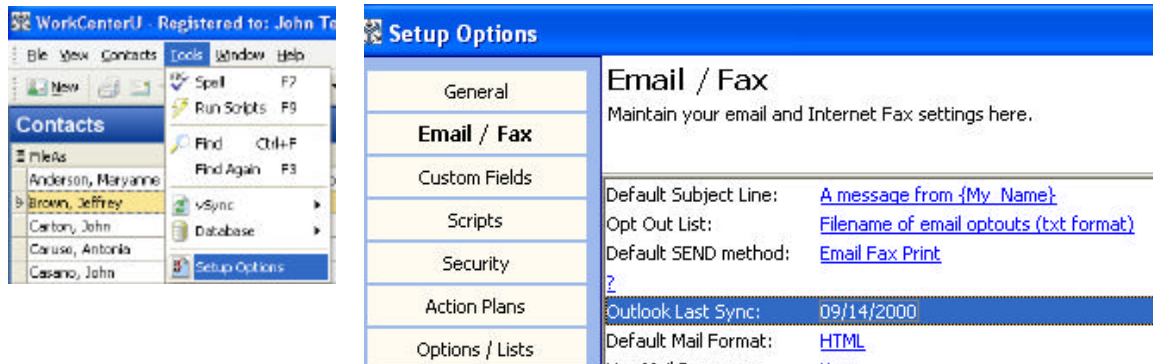
WorkCenterU Software interfaces with your Outlook Emailing System

Importing Outlook Contacts into WorkCenterU CRM Software:

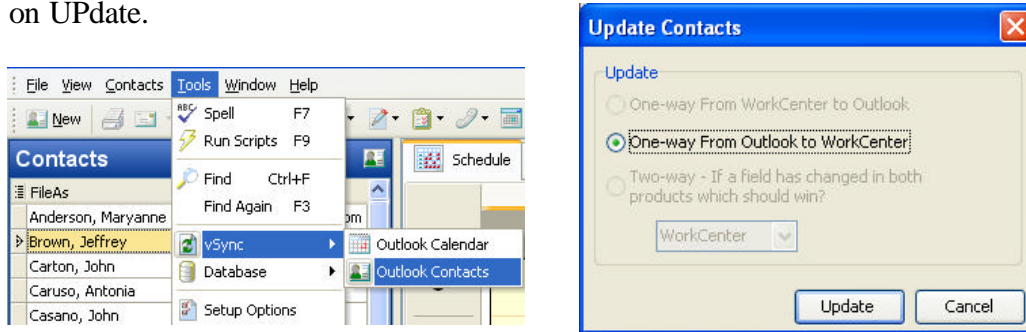
Step#1: Open your Outlook and make sure that all of your deleted items being held in the deleted folder inside Outlook have been removed or deleted from that folder. The reason for deleting these contacts from the deleted folder is Outlook keeps these contacts in memory and may interfere with the script files that sync data into and from WorkCenterU Software.



Step#2: In WorkCenterU, click on “Tools”, “Setup Options” and select the “Email/Fax Button”. This process will **only** sync in contact records that have been modified from the date displayed in this screen view. If your contact record was last changed prior to this date, it will not sync into WorkCenterU. You can click into the date and roll the date back or forward to meet your needs.



Step#3: In the main screen view, click on “Tools”, “ vSync” and select “Outlook Contacts” and click on UPDATE.



If you wish to sync contact records and calendar items from your WorkCenterU CRM to Outlook, you have an option to purchase an add-on module at a very reasonable price. Once the module has been purchased, your screen view would have the options appear as shown below.

As we discussed above, WorkCenterU CRM users that have a PDA (Palm Pilot, Blackberry or Interactive Telephone) will want to acquire the add-on module allowing transfer of data in both directions. See the next section in this user guide for more details.

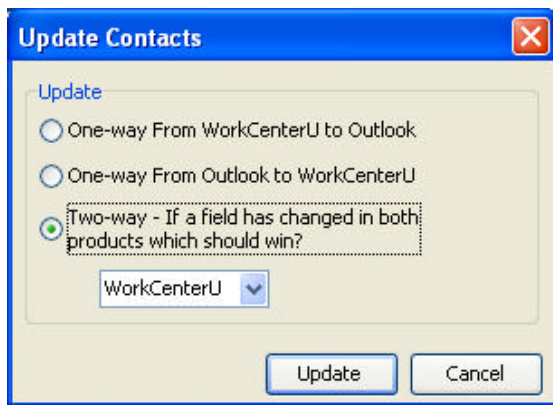
For our example in this user guide, we will assume only one way syncing from Outlook to WorkCenter. We will click the “Update” button and all contact records that have been modified from the date shown in your “Email/Fax” tab will now sync into WorkCenterU CRM. Once the contacts have been successfully synced from Outlook to WorkCenterU CRM, the date will be automatically changed in your setup option Email/Fax settings as shown below.



Syncing Contacts and Calendar Items To and From WorkCenterU CRM:

For those users who elect to purchase the two way synchronization module, we will now show you three additional options for syncing or transferring data to and from WorkCenterU and Outlook.

Option #1: As we explained above, you have an option to purchase the add-on module for syncing data both directions. If you have purchased the add-on module, you will now see this screen view appear when selecting “Tools”, “vSync” and the Outlook options.



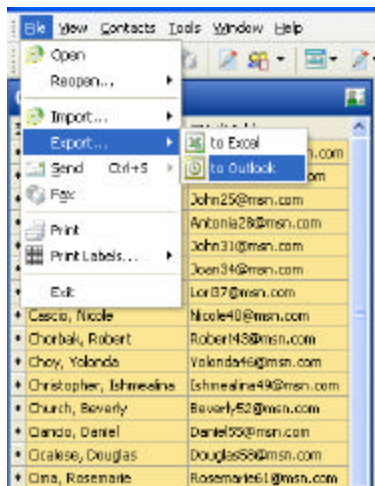
If you decide to perform a two way synchronization of data, you will need to choose what program will be dominant in the data transfer. The screen view to the



left displays “WorkCenterU”. If you wish to have “Outlook” become the dominant software program, click on the down arrow and select “Outlook”.

When data in calendar or contact items differ between Outlook and WorkCenterU CRM, the dominant software program will override and update the non-dominant data record.

Option #2: Selecting contacts from WorkCenterU CRM and transferring that data to Outlook can be accomplished by selecting your records from the left side to the main screen view. As you can see by this screen view, we have highlighted several WorkCenterU contact records. Once the contacts have been selected, click on “File”, then “Export To” and select “Outlook”.



The selected contact records will be synced into your Outlook contact records. Using this approach, the WorkCenterU CRM contact records will take priority over your Outlook contact records for updating.

Option #3: WorkCenterU CRM when installed will automatically create a WorkCenter Outlook button. This WorkCenter Outlook button will allow you select one or multiple Outlook contact records and transfer or add them to your WorkCenterU CRM database.

Here is a screen view of your WorkCenter Outlook button and the options you have when you select the drop down arrow. You can select one or multiple contacts and add them to your WorkCenterU

database by selecting the “Add to Contacts” option.

