

Veco User Guides – Export to Outlook/Blackberry

Introduction

For members of staff who spend time out of the office it is sometimes useful to be able to take your “Veco” contacts with you on a handheld device such as a Pocket PC, mobile phone, or Blackberry.

While “Veco” does not have a mechanism for copying details directly, all handheld devices come with additional software to allow the synchronisation of contacts with Microsoft Outlook. In the case of the Blackberry the software is called “Blackberry Desktop”.

This document explains how to copy contact details from “Veco” to Microsoft Outlook. In order to copy the contacts from Outlook to a handheld device please refer to the device’s own user guide, or contact your system administrator.

Note: Copying “Veco” calendar appointments to a handheld device can be done in a similar way to the instructions shown below. See later for further details.

Important Notes

- Only basic contact information (names, addresses, etc) can be copied into Outlook
- The copying process is only in one direction (from “Veco” to Outlook) - the details should not be changed in Outlook or on the handheld device as there is no way of updating “Veco”

Copying to a Handheld Device

The process of copying to a handheld device is in four stages:

1. Export “Veco” details to Microsoft Excel
2. Save the Excel details to a CSV format file
3. Import the CSV file into Microsoft Outlook
4. Synchronise with your handheld device

Each of the above stages needs to be completed each time you wish to update Outlook and your handheld device.

Preliminary Procedure

Before attempting to copy “Veco” contacts to Outlook it is necessary to create new Outlook contact folders that will be used to store the “Veco” details. This is done to ensure that the “Veco” details are not mixed up with other Outlook contacts.

To create a new contact folder in Outlook:

1. Locate the “Contacts” folder from your Outlook folders tree
2. Right-click on the “Contacts” folder
3. Click “New Folder”
4. Enter a name for the new folder (eg “Veco Contacts”)
5. Click “Ok”
6. The new folder “Veco Contacts” will appear as a sub-folder of “Contacts”

You may wish to create several new folders for different types of contact (eg “Veco Owners”, “Veco Tenants”, etc)

Procedure for copying “Veco” Contacts to a Handheld Device

Export “Veco” details to Excel

1. In “Veco”, select a grid containing contact details. This could be the main “Contacts” folder or one of the sub-folders “Owners”, “Lettings Applicants”, “Sales Applicants”, “Tenants”, or “Suppliers”.
2. Set any filter conditions you require so that the grid shows all contacts you wish to export
3. Right-click anywhere on the grid and select “Export Grid”
4. Note that if you do not see “Export Grid” as an option your administrator may have restricted this facility due to your company’s security policy.
5. Select a folder and enter a name for the Excel file to use. You should use the same filename each time to carry out this process.
6. Click “Save”
7. The contact details have now been saved as an Excel spreadsheet

Save the Excel details to a CSV format file

8. Open the Excel file when prompted
9. Click “File : Save As...”
10. Select a folder and enter a name for the CSV file, and select “Save as Type: CSV (comma delimited)”
11. At the next warning prompt click “Yes”
12. Exit Excel.
13. If prompted to save click “No”.

Import the CSV file into Microsoft Outlook

14. Open Outlook
15. Click “File : Import and Export...”
16. The “Import and Export Wizard” will open
17. On the first page choose the option “Import from another program or file”
18. Click “Next”
19. Select file type “Comma Separated Values (Windows)”
20. Click “Next”
21. Browse for the file to import. (This may already be selected if you have run this procedure previously)
22. Click the option “Replace duplicates with items imported”
23. Click “Next”
24. Select the destination folder into which the contacts should be imported (eg “Veco Contacts”)
25. Click “Next”
26. Click the button “Map Custom Fields”
27. Drag fields from the left box to the right box to “map” Veco fields to Outlook equivalent fields, as shown in the table below:

Field	Mapped from
Title	Title
First Name	First Name
Last Name	Surname
Company	Company
Business Street	Unit Number
Business Street 2	Street
Business Street 3	Locality
Business City	Town
Business State	County
Business Postal Code	Postcode
Business Country	Country
Business Phone	Communication
Categories	Status
Manager’s Name	Responsibility Of
User 1	Reference

You may wish to experiment by mapping different “Veco” fields.

28. Click “Ok”
29. Click “Finish”. The details will now be imported from the CSV file into the selected Outlook folder

Synchronise with your handheld device

30. Contact your handheld device to your PC by USB connection or the device’s “cradle”
31. The synchronisation process should start automatically, or you may need to start up the software supplied with the handheld device.
32. After synchronisation is complete the contacts will be available on your handheld device!

“Veco” Calendar Appointments

Details from the “Veco” diary can also be copied to a handheld device using a variation of the above method.

The main differences are with the “Preliminary” and “Export” stages, and the “field mapping”:

1. First, a new “Veco Diary” folder needs to be created in Outlook
2. When exporting details to Excel you should first filter the “Diary” grid in “Veco”.
3. When importing the CSV file into Outlook the field mapping table should be configured as follows:

Field	Mapped from
Subject	Subject
Start Date	Start Date
Start Time	Start Time
End Date	End Date
End Time	End Time
Location	Property
Categories	Type
Description	Contact

As with the contacts, you may wish to experiment with different field mappings.