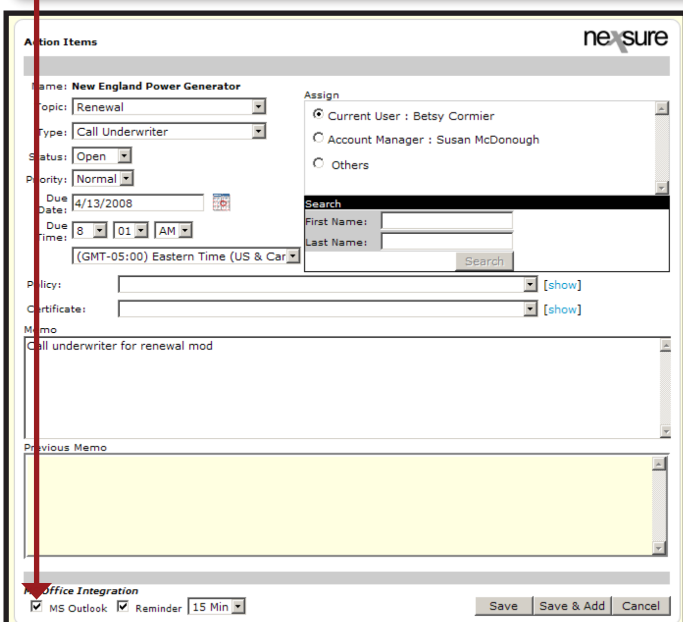
In This Issue

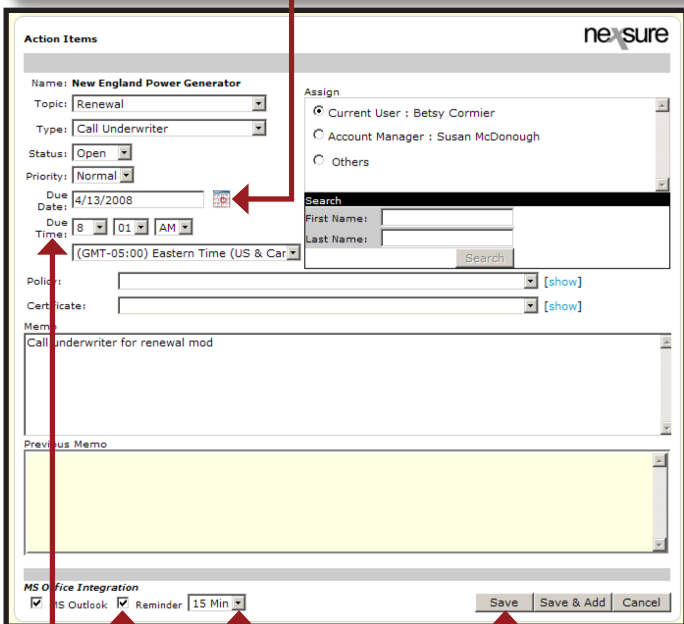
Synchronize Actions with Microsoft Outlook

Open actions assigned to the logged-on user can quickly be added to their Outlook Calendar or Tasks using Nexsure's **Microsoft Office Integration for Microsoft Outlook**. Actions are added by the user at client and policy levels as well as through servicing functions. Once an action is open, perform the following steps to synchronize Actions with Microsoft Outlook:

1. When actions are created or edited, click the **MS Outlook** box in the lower left corner of the **Action Items** pop-up window to mark the action for synchronization with Outlook.

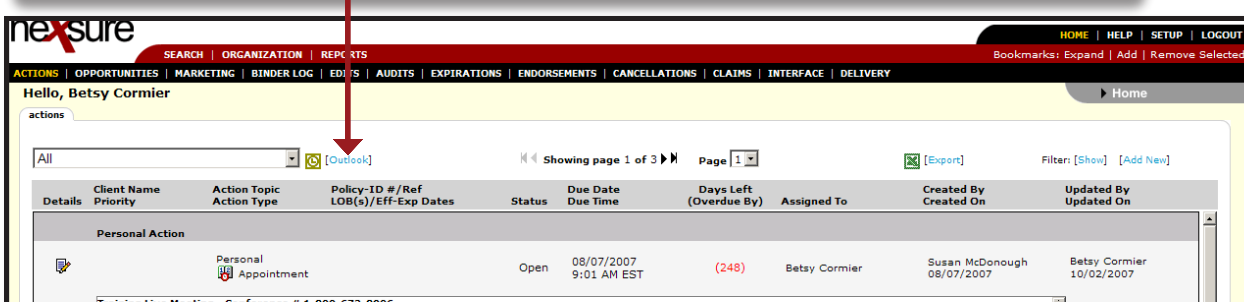


2. Click the **Calendar** icon to select the action's **Due Date**. The action's **Due Date** is the date the action will synchronize as an appointment on your **Outlook Calendar** or the due date of tasks.

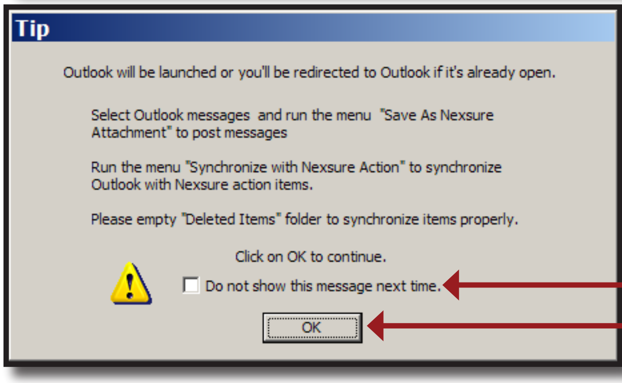


3. Select the **Reminder** check box to set up an Outlook reminder for the action when it is synchronized. The reminder will occur in the number of minutes selected from the **Due Time** of the action. Click **Save** to complete the action.

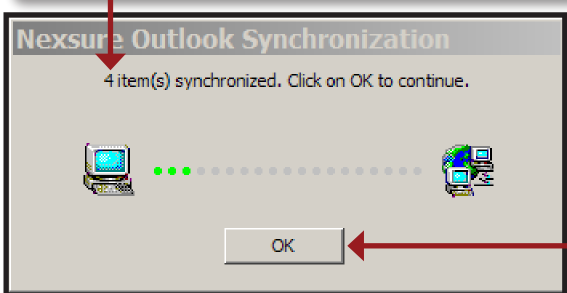
4. From **Home > ACTIONS**, click the **[Outlook]** link. All actions created or updated throughout the day that are assigned to the logged-on user and have been marked for Outlook synchronization can be synchronized at one time by clicking the **[Outlook]** link on the **Home > ACTIONS** screen.



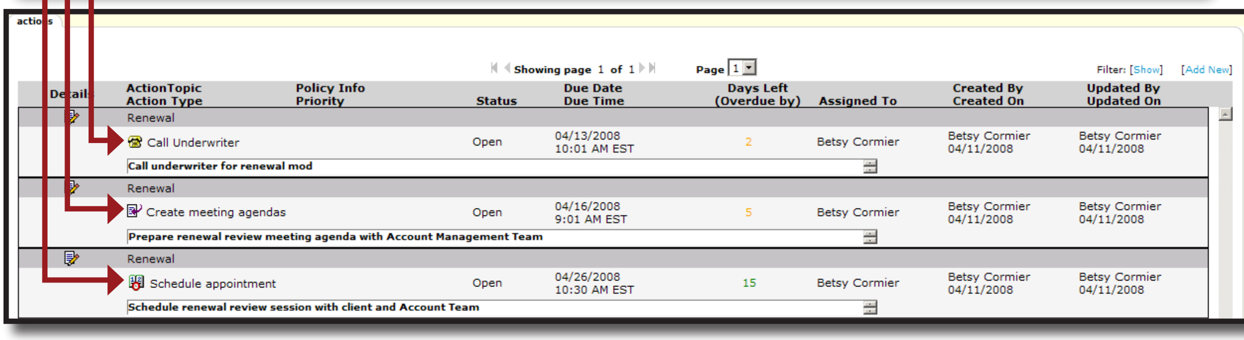
5. If this is the first time synchronizing actions with Outlook, the following **Tip** message will display. Click the **Do not show this message next time** check box to disable this message when synchronizing actions. Click **OK** to start or be redirected to Outlook.



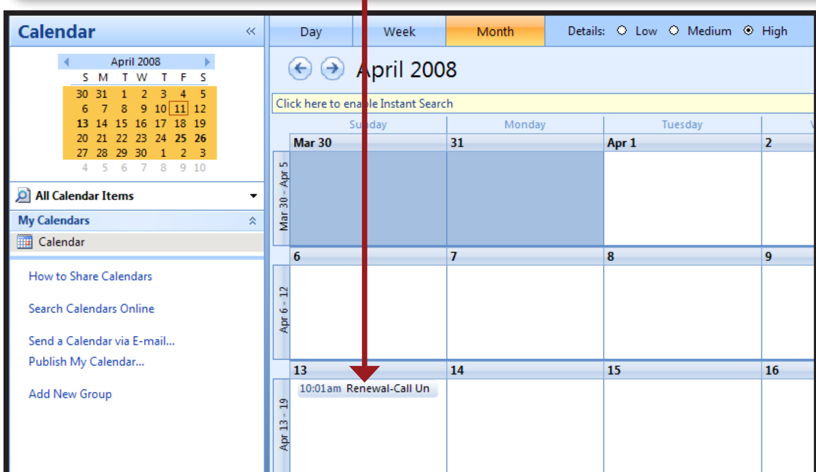
6. A **Nexsure Outlook Synchronization** message will display while the synchronization is in process. When the synchronization is complete, the message displays the number of items that have been synchronized. Click **OK** to continue.



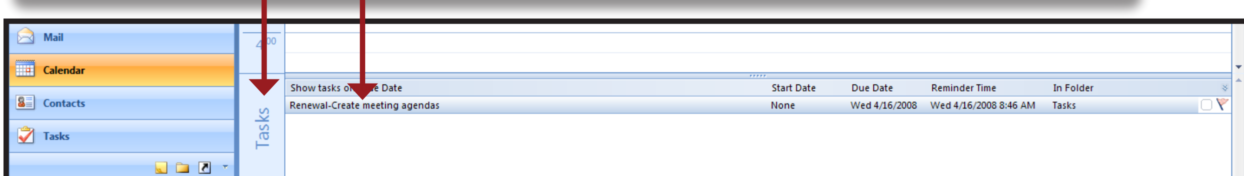
7. Actions are added to the **Outlook Calendar** or **Tasks** according to the icon assigned to the **Action Type**.



8. Actions that display with a **Phone** or **Schedule Calendar** icon on the Action summary screen are added to the user's Outlook Calendar as an appointment when synchronized.



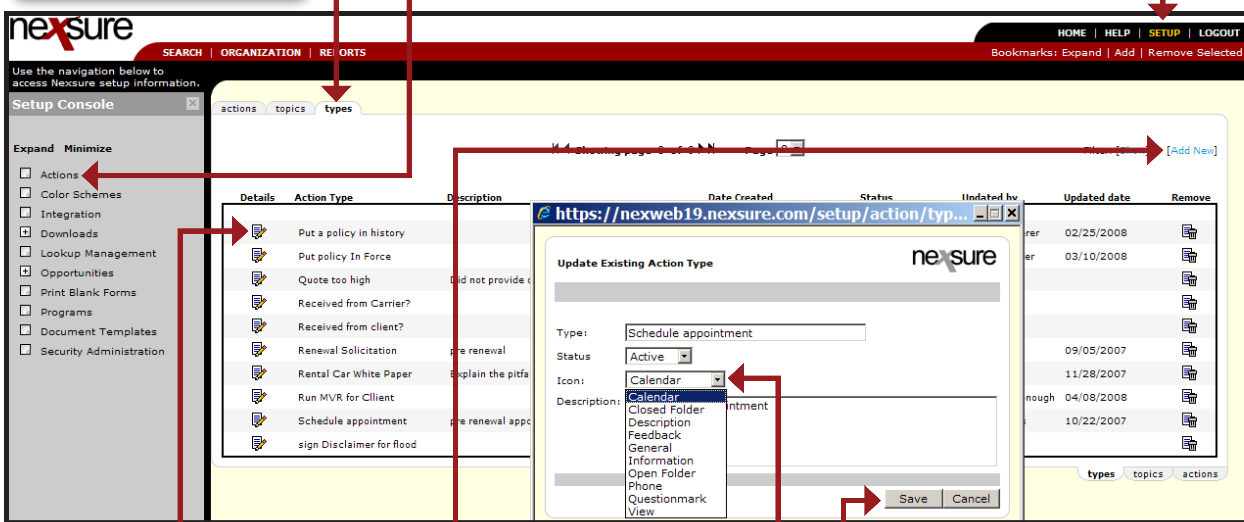
9. Actions that display with any other icon on the Action summary screen are added to the user's **Outlook Tasks** when synchronized. The synchronization of Nexsure Actions to Outlook is outgoing only. Any updates to actions in Nexsure will update the user's Outlook on subsequent synchronizations. Updates to actions made in Outlook do not synchronize back to Nexsure Actions. Remember to update your Nexsure Actions for proper documentation of client activity.



How to select an Action Type's Icon

Perform the following steps to select an Action Type's icon:

1. On the **Utility** menu, click **SETUP**.
2. In the **Setup Console**, click **Actions**.
3. Click the **types** tab.



4. Click the **Details** icon to update an existing **Action Type**, or **[Add New]** to add a new **Action Type**.
5. Select the appropriate icon for the **Action Type** from the **Icon** list. Click **Save** to update the **Action Type**.