1 Overview

OutlookWise has featured several articles over the years detailing Outlook's inherent contact management capabilities. This article looks at how you can extend the functionality of Outlook further to incorporate aspects of Customer Relationship Management and Sales Automation. In this document we see how to create a custom **Companies** folder, design a custom form for this folder, and then create linkages between companies and contacts. The same principle can be applied to any custom folder to contain Opportunity data, Project or Event information.

2 The Task at Hand

The task before us is to:

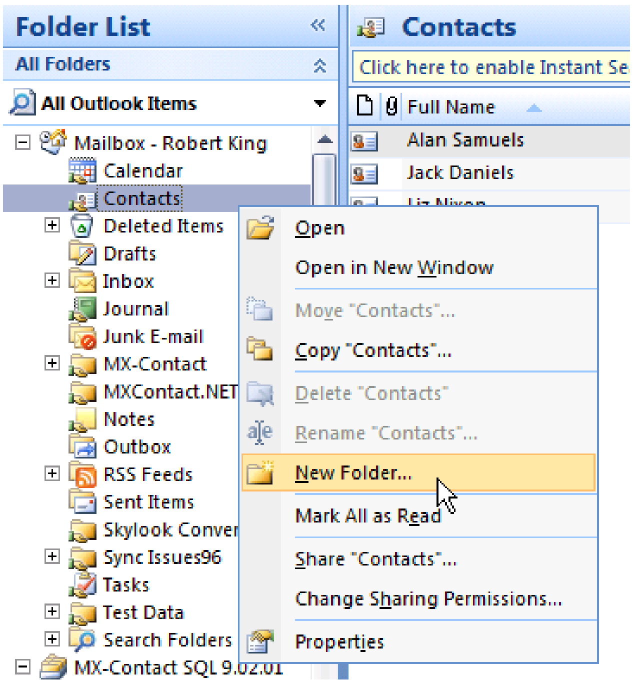
1. create a custom Companies folder,
2. design a custom form for this folder
3. link companies to contacts and vice versa

3 Creating the Folder(s)

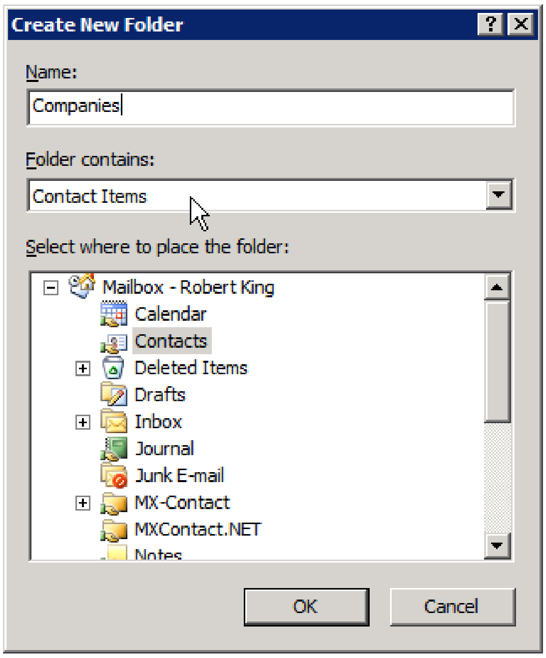
3.1 Creating a Custom Companies Folder

The first step is to create a custom Companies folder. Follow the steps below:

1. Open Outlook and locate the **Contacts** folder.
2. Right click on the **Contacts** folder and select **New Folder**.



3. Name the folder **Companies** and select **Contact Items** in the **Folder contains** section. Click on **OK**.



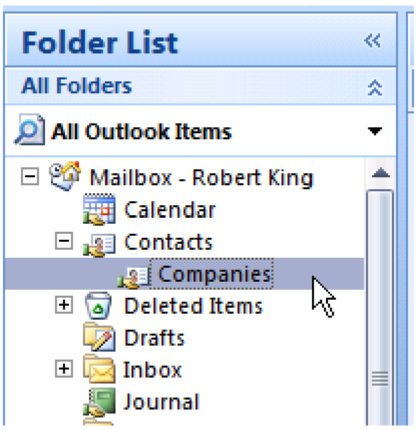
4. Click on the expand button next to the **Contacts** folder. This will reveal the **Companies** sub-folder. Your next step will be to design a Company form.

4 Designing the Custom Form

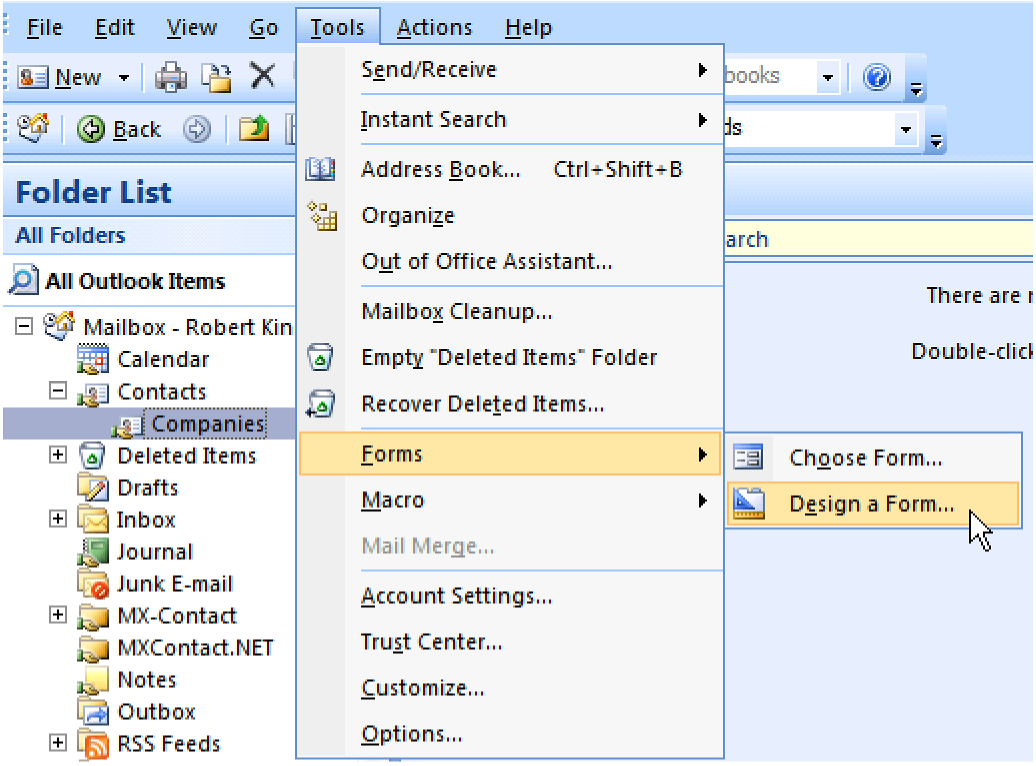
4.1 Opening the Form in Design Mode

Follow the steps below:

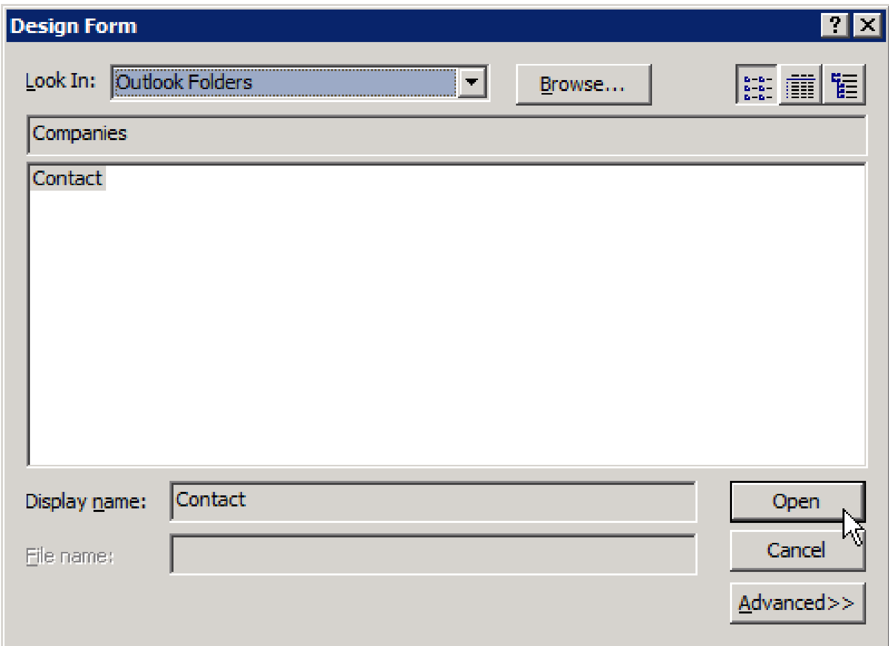
1. Open Outlook and locate the **Contacts** folder. Click on the expand button and select the **Companies** sub-folder.



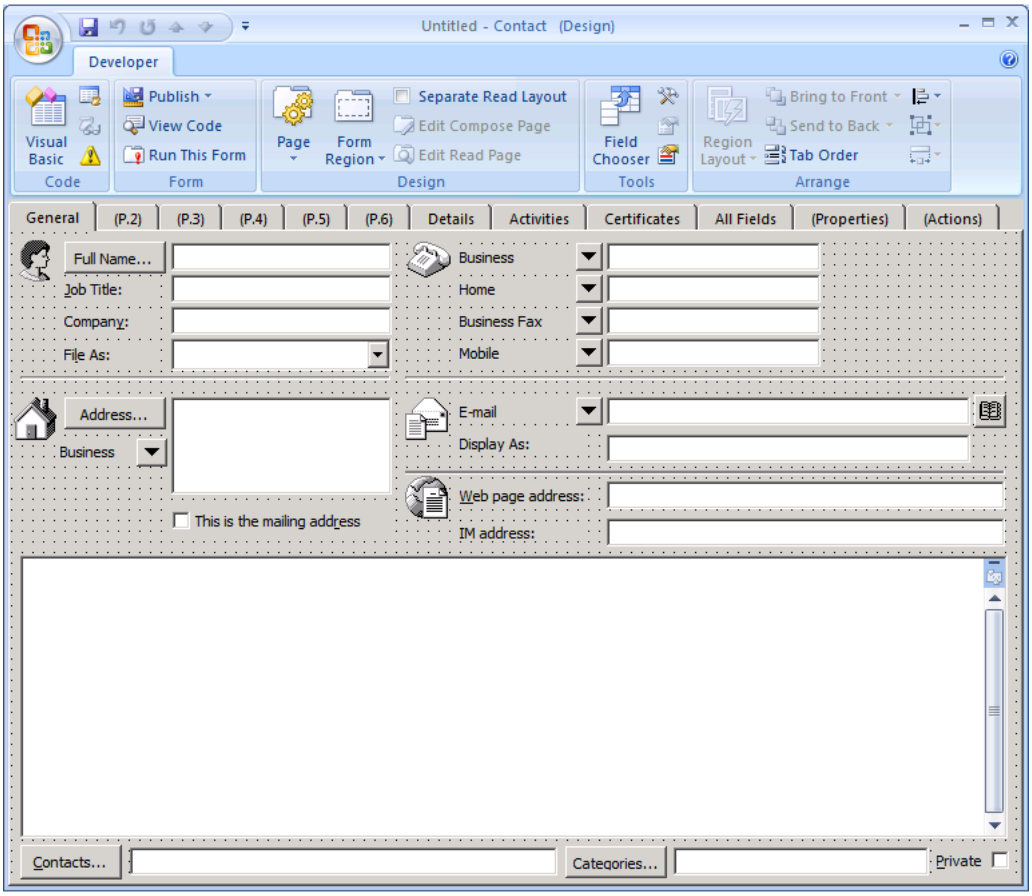
2. Select **Tools, Forms, Design a Form** from the Outlook Main Menu:



3. Select **Outlook Folders** from the **Look In** dropdown, select **Contact**, and then click **Open**:



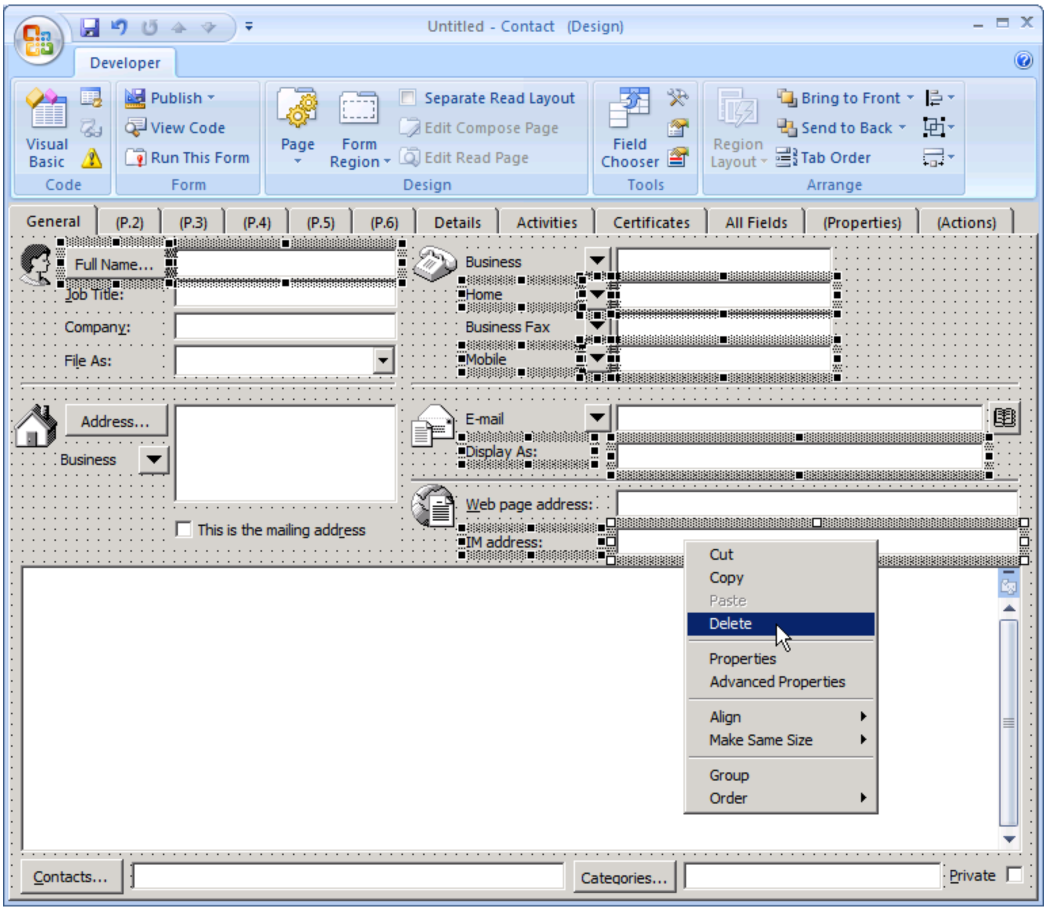
4. You will then have a Contacts form open in Design Mode. This mode allows you to add new controls such as text boxes, combo boxes, labels, etc. You will now be able to modify this form so that it contains all the relevant fields needed to store Company details.



4.2 Deleting, Repositioning and Resizing Fields

Follow the steps below:

1. Remove all the unnecessary fields from the form by selecting them. You can select multiple fields by holding the **Ctrl** key down while making your selection. Once you have done this, right click on one of the selected fields and click on **Delete**.

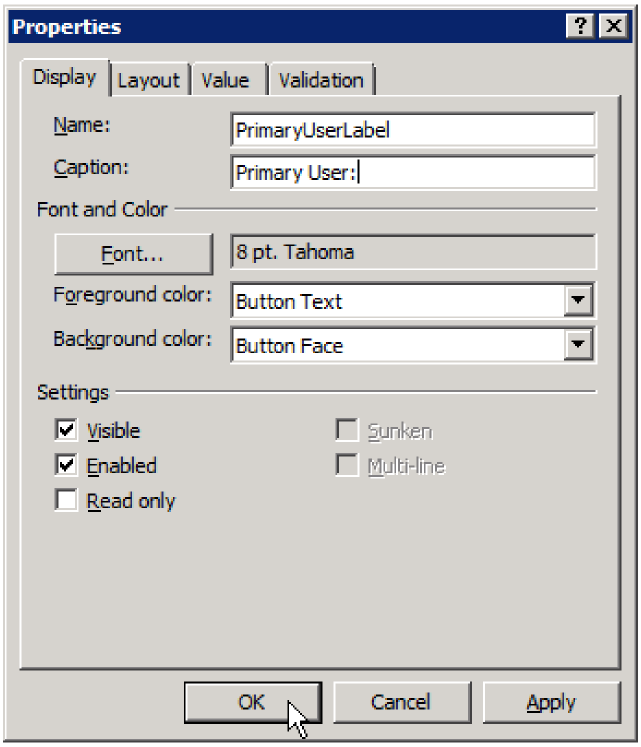


2. You can now reposition the remaining fields on the form. Drag and drop them where you want them to be. If you wish to move a block of fields at the same time, click and drag a box around the group before releasing the mouse button. This will automatically select all the fields in the group. You can now click on one of the selected fields and drag it to the desired position. All the fields in the group will move with this field.
3. Resize a field by selecting that field and dragging it open or closed to the required size.

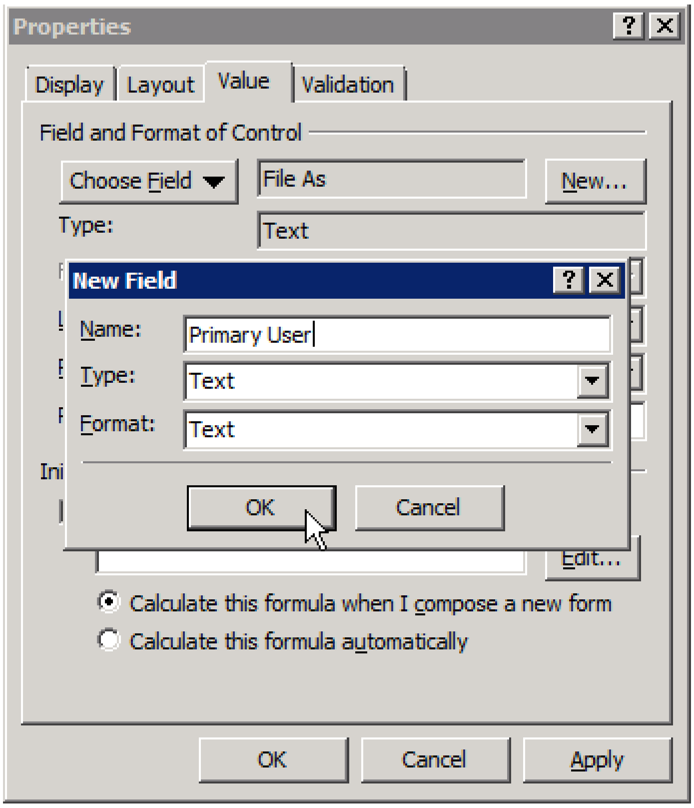
4.3 Renaming Fields

Follow the steps below:

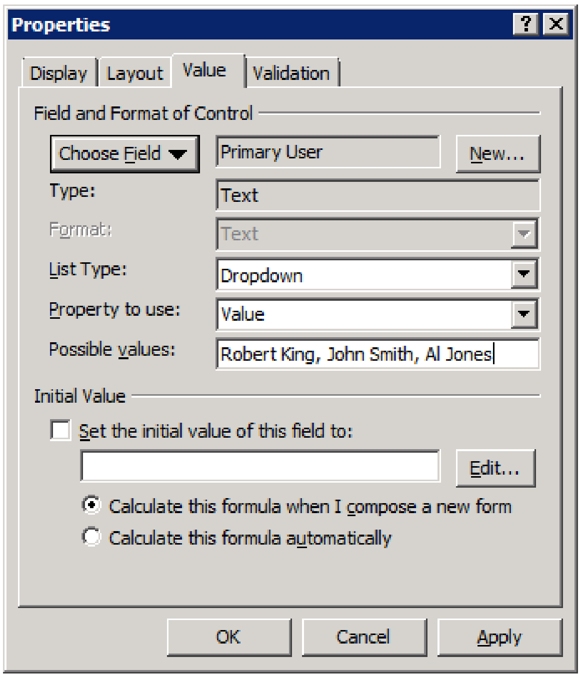
1. In this example we are going to use the **File As** field as our Primary User field. To rename this field, right click on the label and select Properties. The Name will be PrimaryUserLabel and the Caption will be Primary User. Click on **OK**.



2. Right click on the field. Change the Name to Primary User on the **Display** tab. Click on the Value tab. Click on the **New** button. Name the field Primary User and leave **Type** and **Format** as Text. Click on OK.

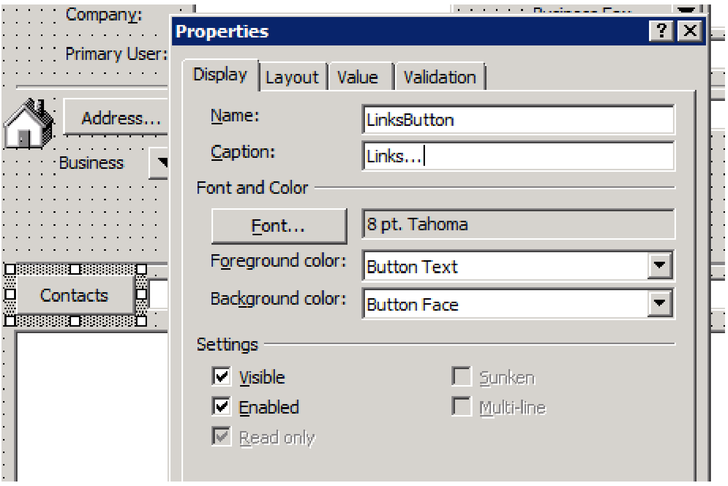


3. Enter the values for your selection list into the **Possible Values** field, separated by commas. In this case it will be the names of the people that you wish to see on your Primary User list.



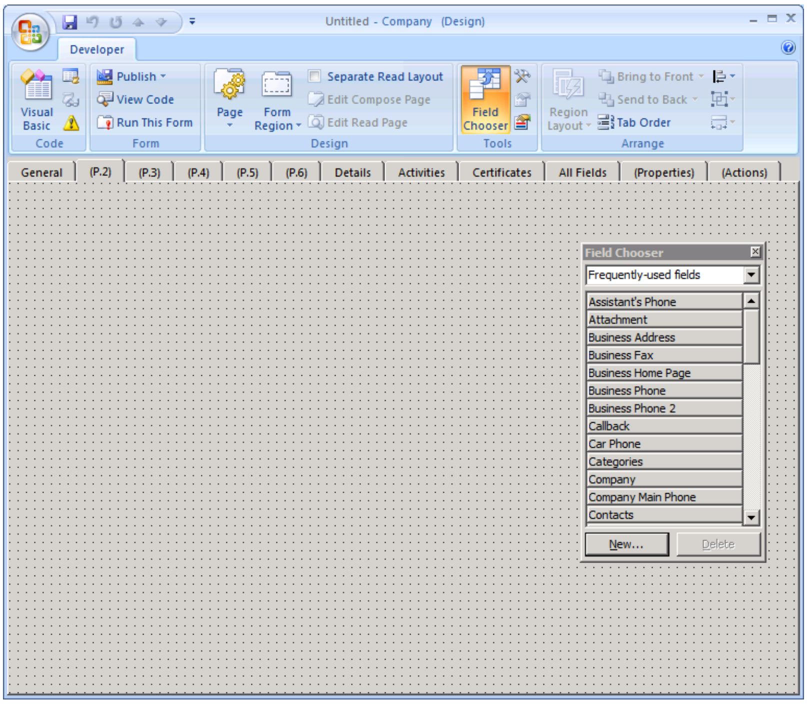
4. Click on **OK**.

5. Change the **Contacts** button to **Links**. Right click on the button and select **Properties**. Change the Name to **LinksButton** and the Caption to **Links…** Click on OK.



4.4 Adding a New Page to an Existing Form

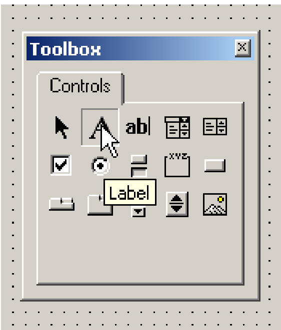
1. Select **P.2** (Page 2). Instead of modifying existing fields, we are now going to put the fields that we want onto a completely new page.



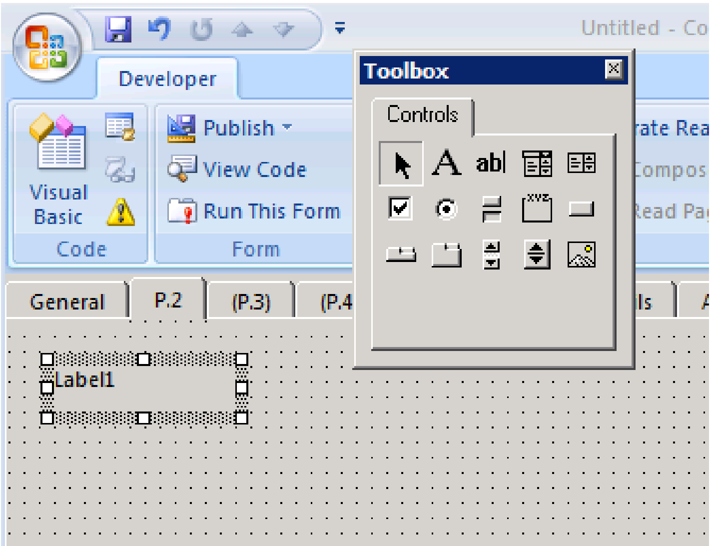
4.5 Adding a Text Box

1. The first step is to add a field for the **Purchases Value**. This is what is known as a normal text box control. All controls are added via the Control Toolbox. Click the Control Toolbox icon:

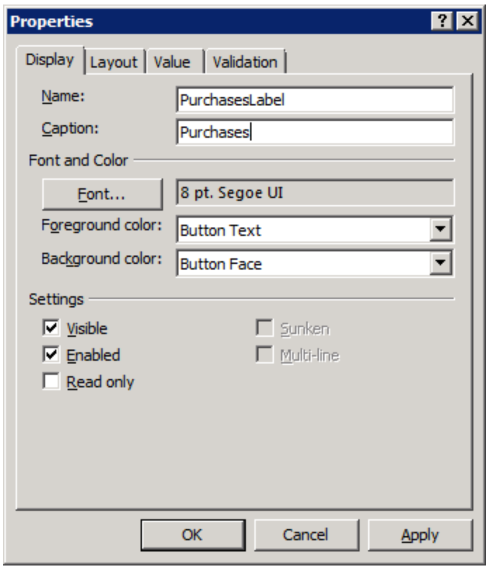
2. Then click on the label icon:



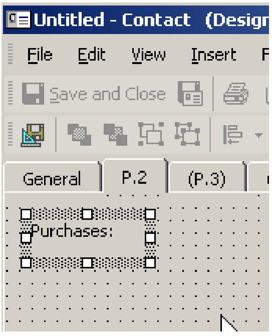
3. Drag a label onto the form: and then right click on the label and select Properties:



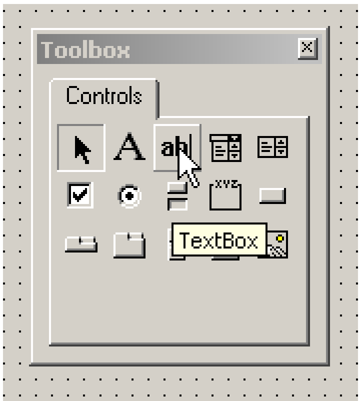
4. Right click on the label and select **Properties.** Change the Name to **PurchasesLabel** and the Caption to **Purchases**.



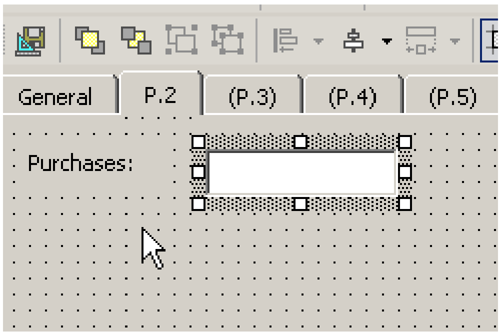
5. Then click on OK and you should now have the label **Purchases**:



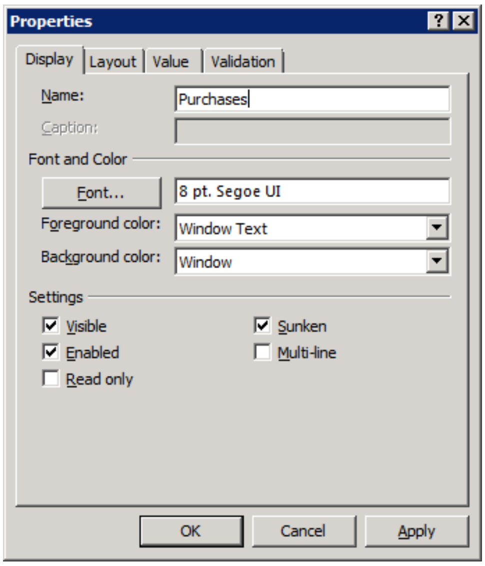
6. Now we want to add a text box for the actual value. So go back to the Control Toolbox and click on the text box icon.

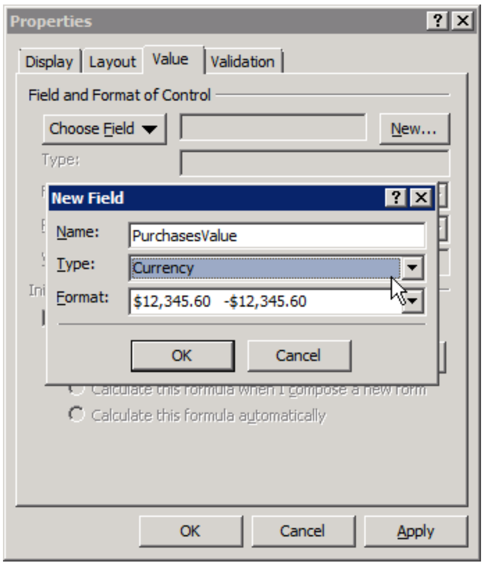


7. Drag and drop a Text Box onto the form, to the right of your label.

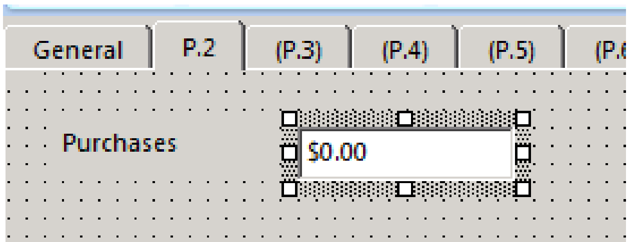


8. Then right click on the text box and select **Properties.**
9. On the Display tab, name the field **Purchases**.
10. Click on the **Value** tab. We now want to add a field called **PurchasesValue.** To do this you click on **New.** Name the new field **PurchasesValue** and select **Currency** as **Type**.





11. Then click on **OK**, and **OK** again, and you should now have the 2 controls next to each other.

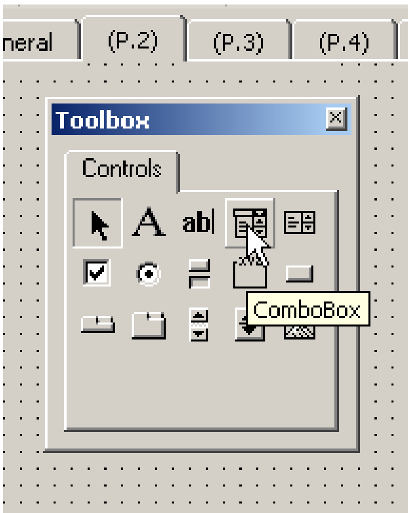


4.6 Adding a Combo Box

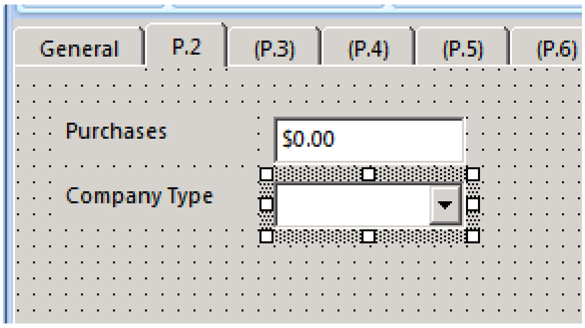
1. Now we are ready to add another field for the type of Company. But first we need a label called **Company Type**. Add that following the same steps as for the Purchases

label. The Name in this case will be **CompanyTypeLabel** and the caption will be **Type**.

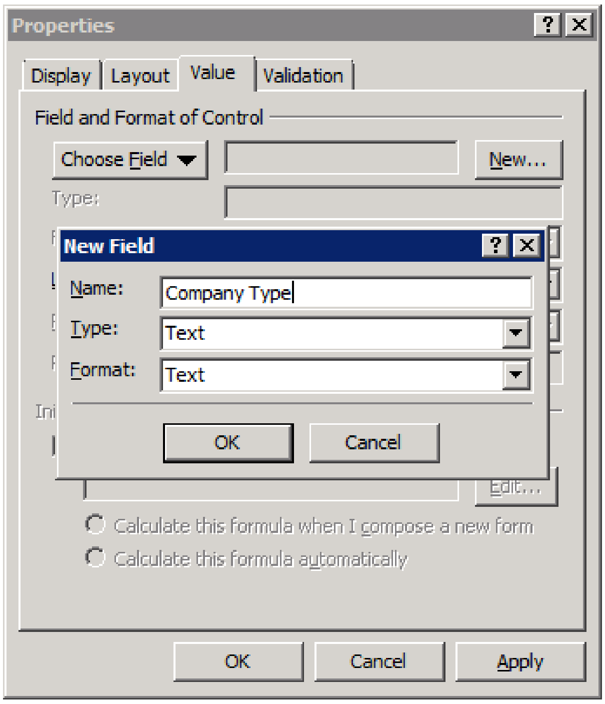
2. We need a dropdown list for types of Companies we deal with. For this we need what is known as a combo box. So look for this icon on the Control Toolbox:



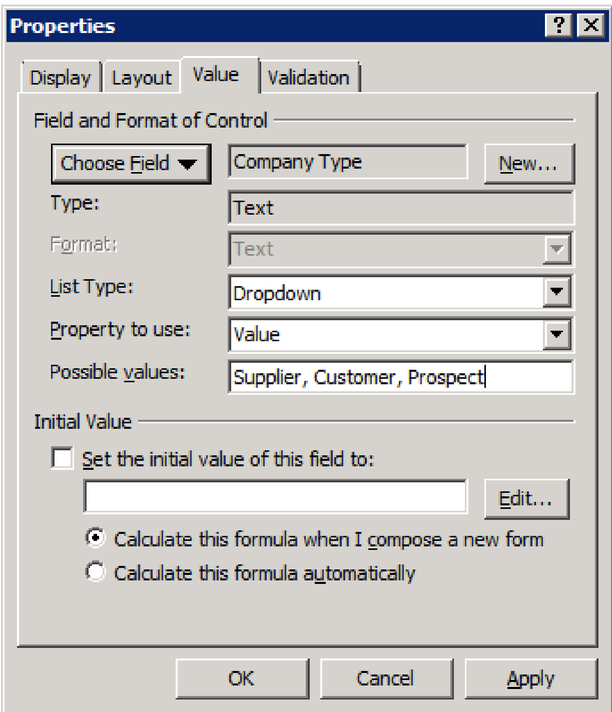
3. Add a combo box to the form by dragging it onto the page, underneath the **Purchases** text box:



4. Right click on the combo box and select **Properties**. Create a new field called **Company Type**:



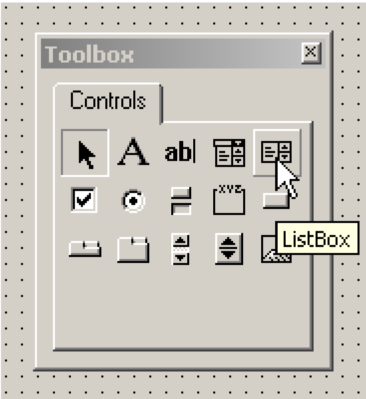
5. Enter the values for your selection list into the **Possible Values** field, separated by commas:



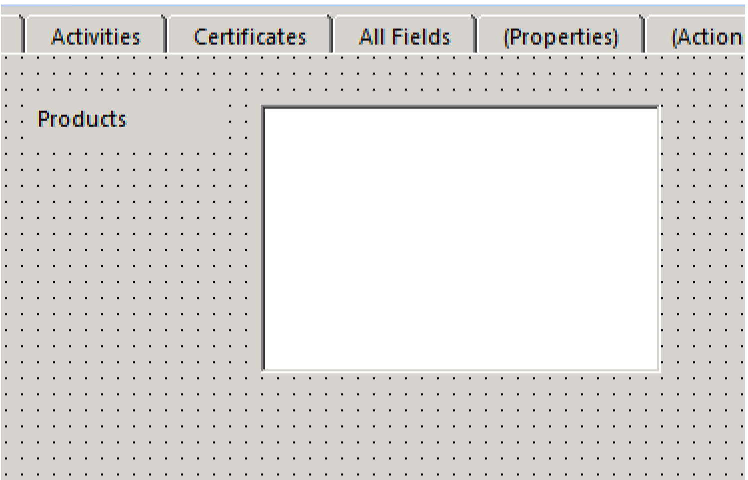
6. Click **OK**.

4.7 Adding a Multi-Selection Picklist

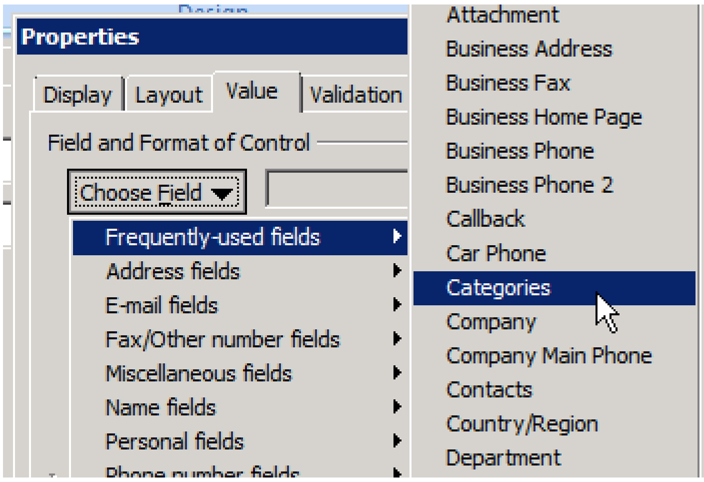
1. We are now ready to add a control for the products that a customer has purchased or is interested in purchasing. For this we need what is called a Multi-Selection Picklist, which allows you to select more than one item in that list.
2. But first we need a label. Add one with a caption **Products**.
3. Now we need the List Box control. Select this from the Control Toolbox:



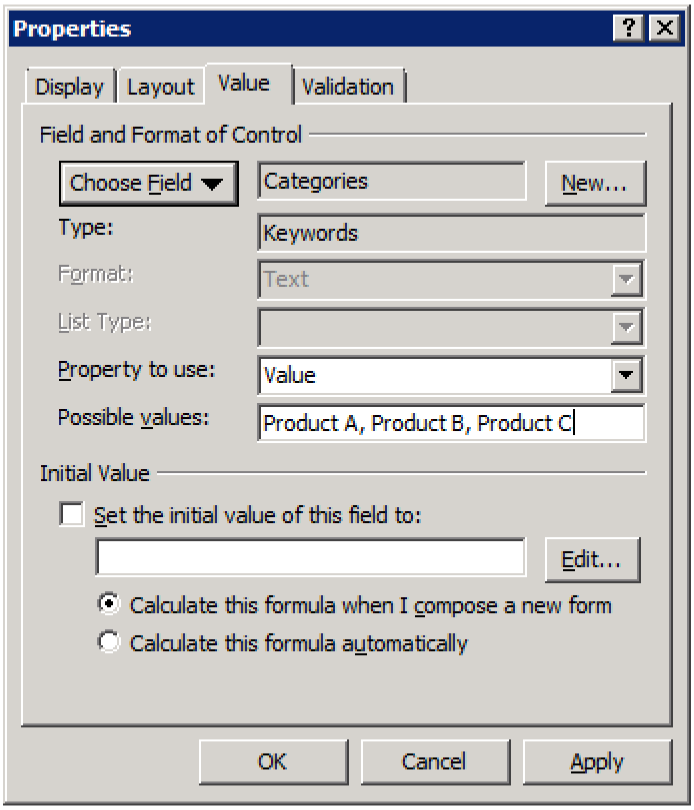
4. Drag a List Box onto the form, and then widen it a bit, as well as increasing the height by stretching the bottom of the box downwards:



5. Right click on the List Box and select **Properties**. On the Display tab, name the field Products.
6. Go to the Value tab. Instead of creating a new field we are going to use an existing field called **Categories**. You select this field by clicking on **Choose Field**, selecting **Frequently-used Fields**, and then choosing the **Categories** field. This is a special type of field called a **Keywords** field. It allows one to store multiple values in the field, separated by commas. These values can be grouped in a View so that one can see the company appearing for each keyword that is displayed in the list.



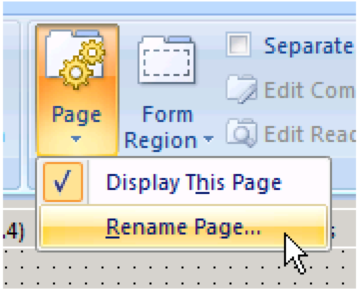
7. Under **Possible values**, enter the list of products that are applicable, separated by commas:



8. Click on **OK** to complete the exercise of adding the List Box.

4.8 Renaming the Page

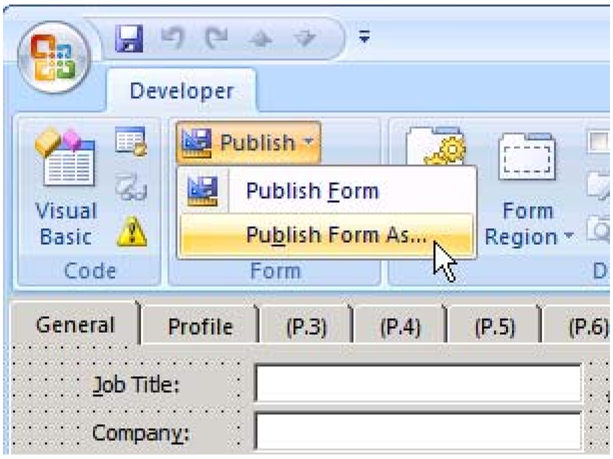
1. The last step is to rename the page from **P2** to **Profile**. Click on **Page** and select **Rename Page**. Type in **Profile** and click **OK**.



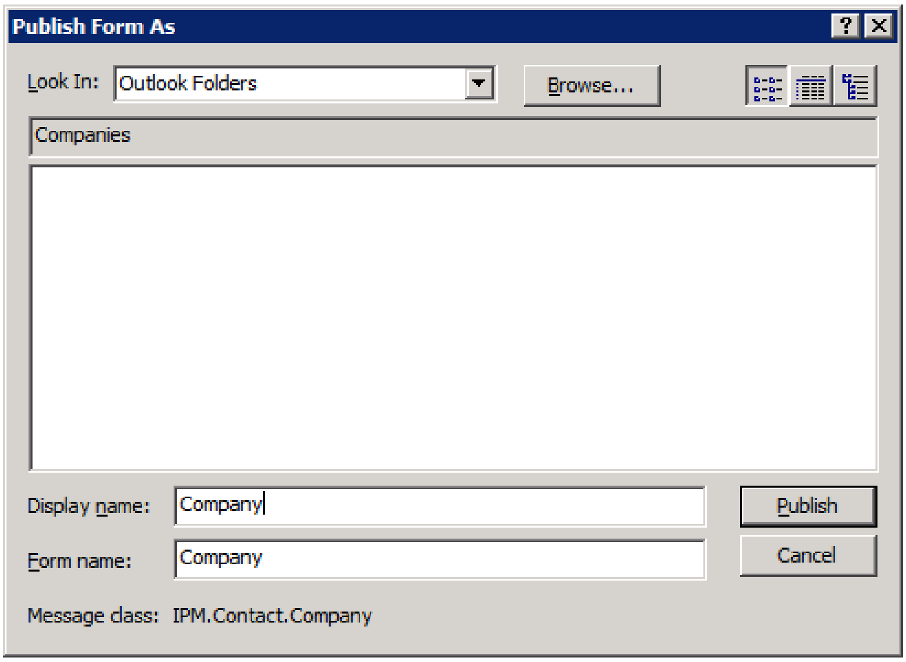
4.9 Publishing a Form

Follow the steps below:

1. Once you have made all your changes, you are now ready to publish this form. Click on **Publish** and select **Publish Form As**.



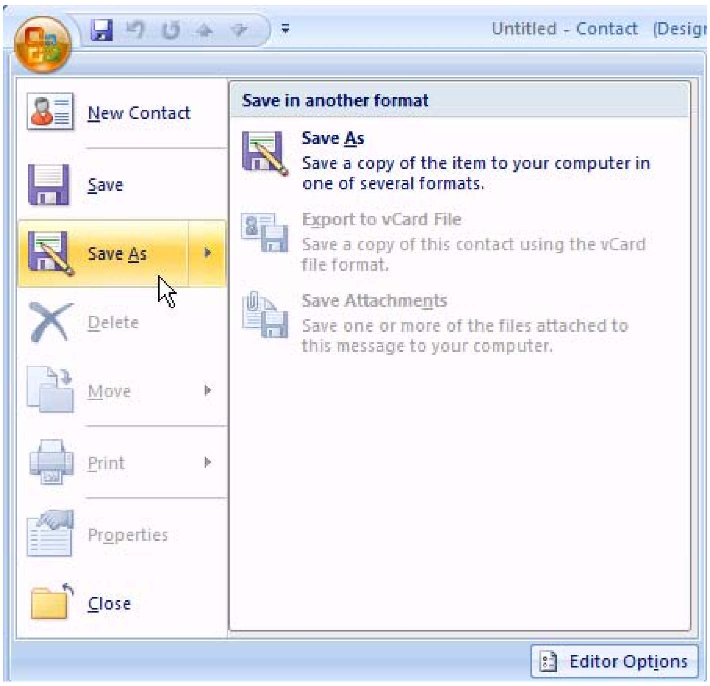
2. Change the **Display Name** to **Company**. Click on **Publish**. This can be done at any time during the design of the form. If any changes are made once you have published the form, repeat this process but instead of clicking on Publish form as, click on **Publish form**.



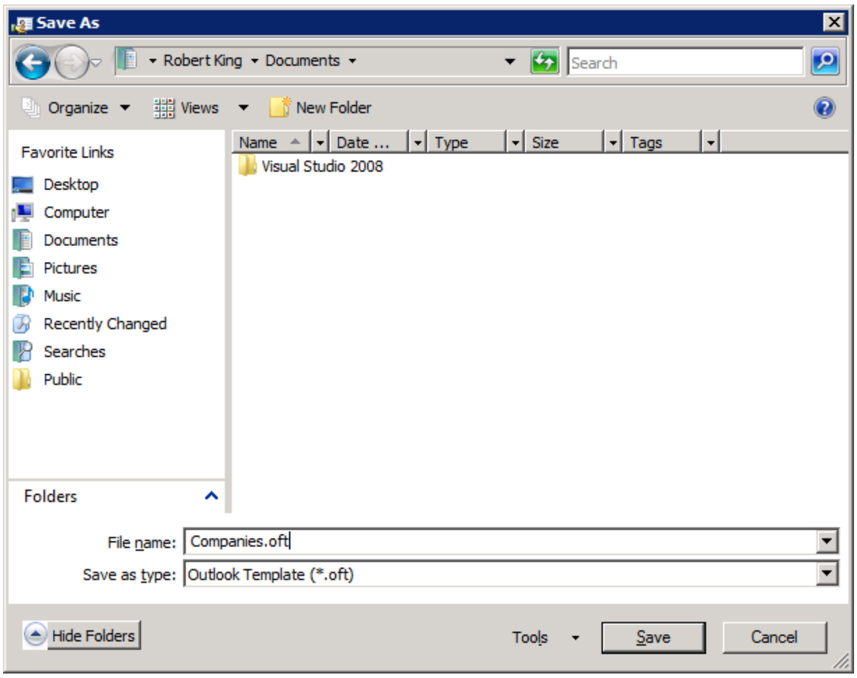
4.10 Saving a Form As

It's always a good idea to keep a backup copy of your form on your hard disk somewhere. That way you can always republish your form if anything happens inside Outlook.

1. After publishing the form, click on the Office button and select **Save As**.



2. Save this form as **Companies.oft** under **Documents**.

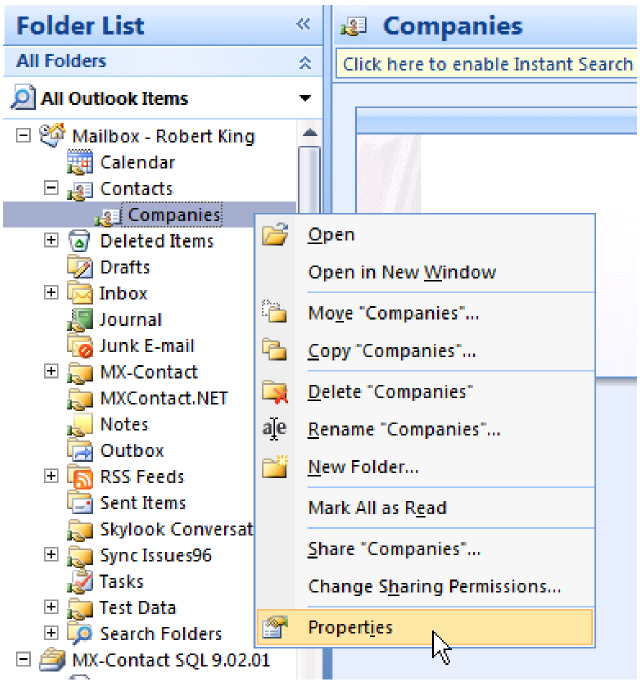


3. When you close the Contact from click **No** when prompted to **Save Changes**.

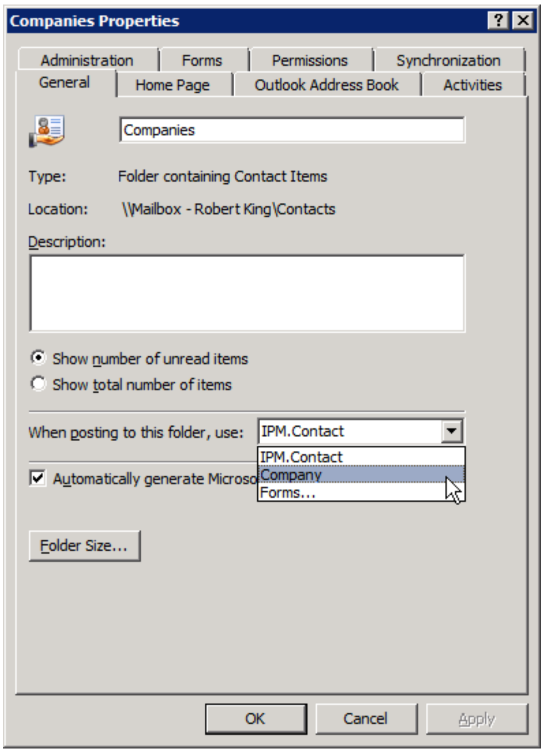
4.11 Setting the Form as the default form for the Folder

Now that you've published your form, you still need to set this form as the default form for the Companies folder, so that whenever you add a new company this form will be used by the system.

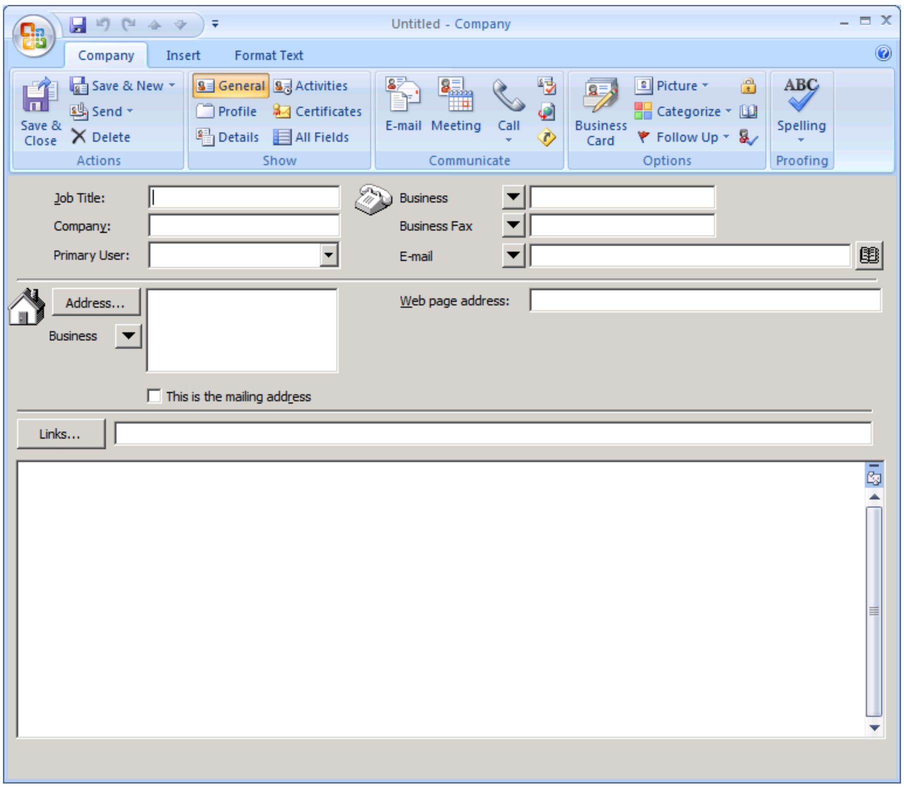
1. Right click on the **Companies** folder and select **Properties**.



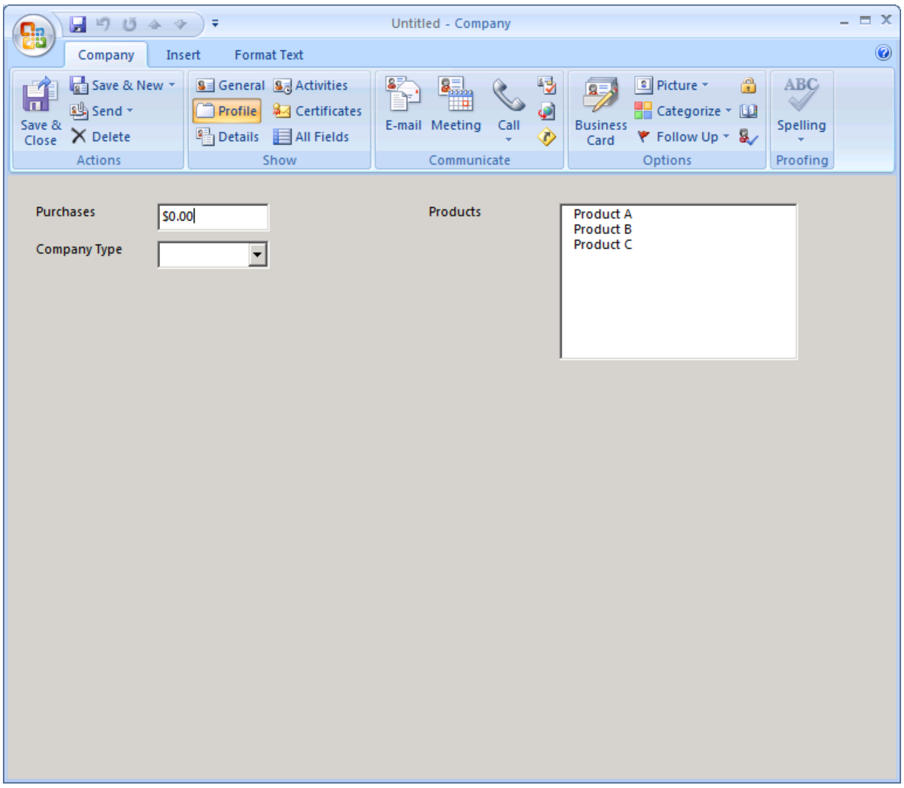
2. In the **When posting to this folder use field**, select **Company**.



3. Click on **Apply** and then on **OK**. Open a new item and check that your custom form is displayed. The **General** tab is the default tab.



4. When you click on the **Profile** tab the following screen will appear:



5 Adding Data and Linking Contact Items

5.1 Adding a Contact

Do the following:

1. Select the **Contacts** folder and click on the **New (Contact)** icon in the Standard Toolbar. Fill in the details and click **Save and Close**.

5.2 Adding a Company

Do the following:

1. Select the **Companies** folder and click on the **New (Contact)** icon in the Standard Toolbar.
2. Enter **Great Lakes Food Market** under **Company Name**. Then click on **Profile**. You should be able to fill in the value of his total purchases, select from the **Company Type** dropdown, and check/tick the various products that the company has purchased.

3. Click on **Save and Close**. Note that the new company appears with a Post icon instead of the normal contact icon, which indicates that a custom form has been used for this contact.
4. Open the form again and check that all your data has saved correctly.

5.3 Linking a Contact to a Company

Do the following:

1. Open the company **Great Lakes Food Market**.
2. Click the **Links** button. Select **Jack Daniels** and **Johnny Walker** in the Contacts list and click OK. Notice these 2 names appear in the **Links** (**Contacts**) box.
3. Double click on the link for **Jack Daniels**. Notice that the contact item opens. Also notice that **Great Lakes Food Market** appears in the **Contacts** box for **Jack Daniels**. That is, the link created to the contact from the company is automatically created from the company to the contact.

6 Integrating Outlook Data with your Back-End CRM or ERP System

Having the ability to create custom folders and forms in Outlook to extend Outlook's functionality beyond simple contact management is one thing. But the real benefit in all this usually lies in being able to integrate this data with your corporate accounting or CRM database.

This integration can be achieved by utilizing a utility like MX-Sync. MX-Sync is an Exchange Server to Database synchronization utility. So it is used to synchronize Outlook/Exchange with any back-end database, be it SQL Server, MySQL, Oracle, Sybase, etc.

For more information on MX-Sync visit www.mxsync.com.

6.1 Custom Folders

MX-Sync will synchronize data bi-directionally between Outlook/Exchange custom folders and a SQL (or other) database in the same way it syncs any other Outlook/Exchange folder.

So for example, MX-Sync can be used to synchronize not only Inbox, Sent Items, Contacts, Calendar, Tasks, etc, but also any custom folders like **Companies**, **Groups, Opportunities**, etc.

(Note that when MX-Sync runs, it can be set to create the required custom folders in each user's mailbox automatically).

MX-Sync will also synchronize the custom (non-Outlook) fields associated with the corresponding table in SQL Server. So for example, if an Opportunities table exists in SQL, with custom fields like **Stage**, **Status**, etc. MX-Sync will sync these data fields down to Outlook and create the necessary custom fields.

6.2 Links Between Items

Aside from simply synchronizing the data, MX-Sync can also create links in the SQL database between items/records. So if your Outlook Company form has the ability to create links to Contacts then MX-Sync can create the necessary links between the company and contact item in the SQL database.

7 About OutlookWise and ExchangeWise

OutlookWise is both a web site and newsletter aimed at keeping Microsoft® Outlook® users up-to-date with news, information and articles of interest on Outlook and Exchange Server, as well as reviews of add-on products and utilities, all geared to enhancing your knowledge of Outlook and increasing your productivity.

If you've found this article useful, please subscribe to the monthly newsletter.

If you would like to contribute an idea or article, or tell us about an exciting product or utility that complements Outlook and/or Exchange Server, please feel free to e-mail us.

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OutlookWise is edited by Brian Drury, founder of ExchangeWise, and the architect of MX-Contact, a CRM, Contact Management and Sales Automation System for Microsoft Outlook. Brian has over 25 years experience in the IT industry and has focused on CRM, Messaging and Collaboration systems for the last 18 years.