Importing Outlook Contacts into PhonePad

Introduction

These instructions provide information on how to import your Outlook contacts into PhonePad's Address Book using the **Outlook Import** wizard, which is available free from our website.

1 - Start the Outlook Import Wizard

The Outlook Import wizard (OutlookImport.exe) should be copied to the same folder PhonePad is located in as it needs to access the settings from the PHONEPAD.INI file.

Run the wizard by double-clicking on its icon.



The Welcome screen will be displayed.



Click the **Next** button to advance to the next screen.

2 - Login to PhonePad

You need to login to PhonePad within the wizard so you can access the Address Book. Enter your PhonePad *Username* and *Password*, and then click the **Login** button.

🐁 Outlook Import for PhonePad	- • •
Login Connect and login to your PhonePad system.	1
Enter your PhonePad login details and click Login. Usemame: Adam Password Login Login Login successful. Click Enter your PhonePad Username and Password, then click the Login button	
About About Next X Cancel	🗣 Finish

Once you have logged in, click on the **Next** button.

3 - Download Your Contacts from Outlook

The next step is to download all of your contacts from Outlook

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Retrieve Outlook C Download contacts from	n Outlook.
2	The first step is to download your contacts from Outlook into the Outlook Import database. This database is used to store the Outlook contacts <u>before</u> importing them into your PhonePad Address Book. Click the Download Outlook Contacts button to download contacts from Outlook into the Outlook Import database. Any contacts already in the database will be deleted.
	Download Outlook Contacts Download Outlook Contacts Click the Download Outlook Contacts button Filie Smith Crystal Brown
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(I) About	🔶 Previous 🚺 Next 🗶 Cancel 🚸 Finish

Click the **Download Outlook Contacts** button to retrieve your Outlook contacts. You can skip this step if you have previously downloaded your contacts and don't want to update the data.



button. This means you can retrieve your Outlook contacts and then import them into your PhonePad Address Book at a later time.

Click **Next** when you are ready to continue.

4 - Select the Contacts to Import

This screen allows you to select which Outlook contacts you want to import. Select a contact by clicking the checkbox next to it. If you want to import all of the contacts click the **Check All** button.

🛬 Outlook Import for PhonePad	
Select Outlook Contacts Select Outlook contacts to import into PhonePad.	i
Select the contacts to import into your PhonePad Address Book.	Check All Uncheck All

Click the **Next** button to continue. The Next button will be disabled until you select at least one contact.

5 - Field Mapping

This screen may look a bit daunting but it's not as complicated as it first appears. Outlook has its own set of fields for the Contacts database, and it differs greatly from the PhonePad Address Book fields. The purpose of this screen is to tell the Outlook Import wizard how to map the data it is importing.

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Field Mapping Map Outlook contact fields	to PhonePad Addr	ess Book fields.				1
	These settings ar Microsoft Outlook Address Book fie Details Bus	e used to speci c. The settings ld, select the Ou iness Address	iy the field mappin in the drop-down li tlook contact field Postal Address	gs between the sts are the Out I the data shou Home Addr	e PhonePad Address Book and look contact fields. For each Id be imported from. ess	
	Address 1: Address 2: City: State:	BusinessAdd BusinessAdd B sessAdd	ressStreet • • ressCity • ressState •	Telephone: Alt. Phone: Fax Cell/Mobile:	BusinessTelephoneNumb CompanyMainTelephoneT BusinessFaxNumber MobileTelephoneNumber	
Map the Outlook fields to the Address Book fields						
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The field names in the drop-down lists are the Outlook contacts fields. The labels next to each dropdown list represent the Address Book fields.

Details	Busi	ness Address Postal Address	Home Addr	ess
Address Address	s 1: s 2:	BusinessAddressStreet	tlook Contact	t fields MainTelephonel
City: State:		BusinessAddressCity	Fax: Cell/Mobile:	BusinessFaxNumber
Postal C	Code:	BusinessAddressPostalCc -	Email:	Email1Address
Country		BusinessAddressCountry 👻	Web:	WebPage 👻
PhonePad Address Book fields				

You map a field by selecting an Outlook contact field from the drop-down list. So, for example, in the screenshot above you can see that the Outlook's *BusinessAddressCity* field is mapped to the Address Book's *City* field.

Most of the default settings are probably pretty close to the mappings you want. If you change any mappings they will be remembered by the wizard.

The good news is the mappings usually only need to be done once. After you have made the mapped the fields the way you want them, it's unlikely you will ever need to change them.

Click **Next** to continue to the next screen.

6 - Import Your Contacts

Ok, we're finally there. It's now time to import your Outlook contacts into your PhonePad Address Book. To do this, all you need to do is click the button entitled **Import Contacts into Address Book**. But before you do that, let's take a look at the **Import Options**.

🛬 Outlook Import for Pho	onePad 📃 🖬 🗮	×
Import Selected Outlook co	pok Contacts Intacts into the PhonePad Address Book.	
	You are now ready to import your Outlook contacts into the PhonePad Address Book. Any existing contacts with the same name will be overwritten. Import Options: Imported contacts are private - they should not be accessible by other users Other users should be able to update these contacts (if they are not private) Only add new contacts - do NOT update existing contacts Import Contacts into Address Book	
	Click this button to import your contacts	
(1) About	🜩 Previous 🔿 Next 🗶 Cancel 🚳 Finish	

Import Options

Imported contacts are private – they should not be accessible by other users	This corresponds to the same setting in the PhonePad Address Book.
	If you check this option, all contacts imported will only be visible to you in the PhonePad Address Book.
	If this option is unchecked, all other PhonePad users on your network will be able to view these Address Book entries when they have been imported.
Other users should be able to update these	This also corresponds to an Address Book
contacts (if they are not private)	setting.
	If this option is checked, other PhonePad users will be able to make changes to the imported contacts details, but only if the entry is <u>not</u> private.
	If this option is unchecked, other PhonePad users will be able to access the Address Book
	entry when it is imported, but will not be able to

	change it at all.
Only add new contacts – do NOT update existing contacts	If this option is checked, Outlook Import will only add new Outlook contacts. Existing contacts will be ignored – their data will not be updated.
	If this option is not checked, new contacts will be added AND existing contacts will have their data updated in the PhonePad Address Book.
	IMPORTANT – If you have a lot of Address Book entries then updating can take quite a while. For example, 5000 entries could take half an hour or more.

7 - That's All Folks

When your Outlook contacts have been imported, the Finish screen will be displayed. All that's left to do is click the **Finish** button.

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Finished Outlook contact importing	has been completed.	1
	Importing of Outlook contacts into the PhonePad Address Book has been completed. Click the Finish button to close this wizard.	
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Problems?

If you have any problems with the Outlook Import wizard please report them to support@cybercom-software.com.