

Exporting your AccountRight cards to your Outlook contacts

When you export your AccountRight cards to your Outlook contacts, your contacts are saved by default to group contact folders. For example, Customer contacts are saved in Outlook in a folder called **MYOB Customers**.



If you want to synchronise your Outlook contacts and your Personal Digital Assistant (PDA) or mobile device, your contacts must be saved to the Microsoft Outlook default **contacts** folder. When you export your AccountRight cards to your Outlook contacts, you can select an option to save your contacts to the default contacts folder (see [step 7](#)).

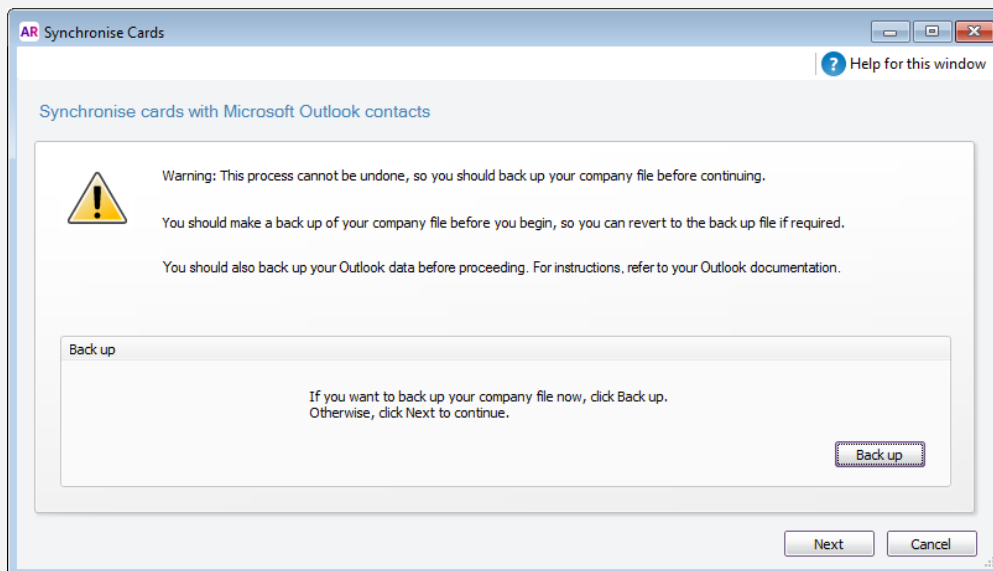
Back up your Outlook contacts

Exporting your AccountRight cards to your Outlook contacts will change the details recorded in your Outlook contacts. Back up your Outlook contacts before synchronising. See your Microsoft Outlook documentation for instructions.

To export your AccountRight cards to your Outlook contacts

To export your AccountRight cards to your Outlook contacts

1. Go to the **Card File** command centre and click **Cards List**. The **Cards List** window appears.
2. Click **Synchronise Cards**. The **Synchronise Cards** window appears.

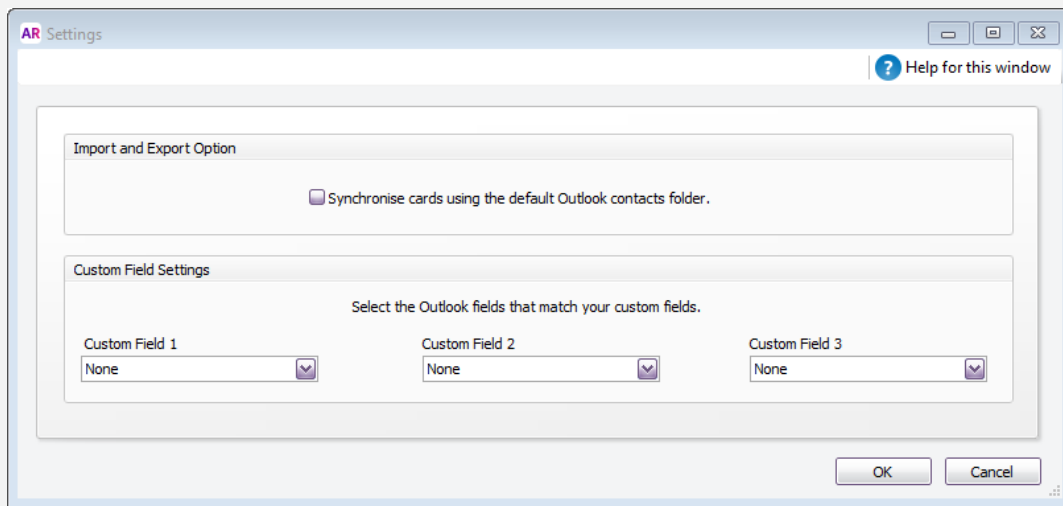


3. Click **Next**. The **Import and Export Options** window appears.
4. Select the card types that you want to synchronise.

You can synchronise cards from any of the Cards List views (Customer, Supplier, Employee and Personal)

The default card type selected varies according to the tab you are on when you click **Synchronise Cards**.

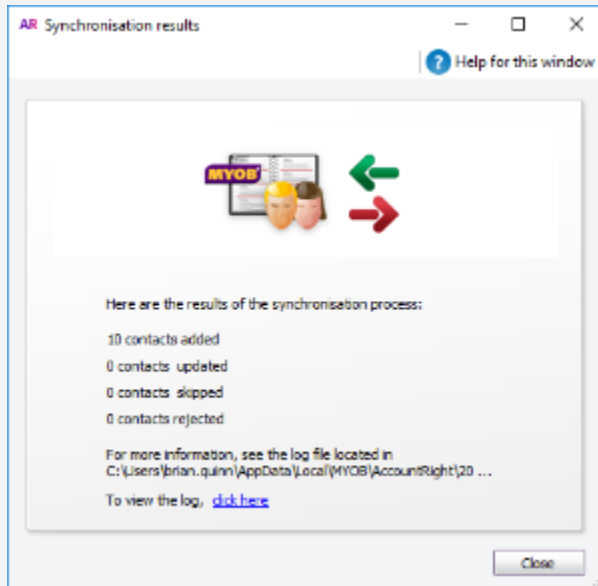
5. If you want to include inactive cards in your synchronisation, select the **Export inactive cards** option. For information about inactive cards, see [Inactivating or reactivating a record](#).
6. Select a synchronisation rule from the **Update Rules** list. For more information, see [Synchronisation update rules](#).
7. If you want to save your AccountRight cards to your Outlook contacts default folder (you need to do this to synchronise your Outlook contacts and your PDA or mobile device), or if you want to export your AccountRight custom fields to your Outlook contacts, click **Settings**. The **Settings** window appears.



1. If you want to synchronise your Outlook contacts and your PDA or mobile device, select the **Synchronise cards using the default Outlook contacts folder** option.
 2. If you want to export your AccountRight custom fields to your Outlook contacts, select a matching Outlook contact field for **Custom Field 1**, **Custom Field 2** and **Custom Field 3**.
 3. Click **OK**. The **Import and Export Options** window reappears.
8. Click **Export**. The export process starts. Depending on the version of Microsoft Outlook you use, and the synchronisation update rules you have chosen, the following messages and windows may appear:

If this window appears...	...do this
Microsoft warning message	Select a period for your AccountRight software to access your Outlook contacts: <ol style="list-style-type: none"> 1. Select the Allow access for option. 2. Select a period from 1 minute to 10 minutes. 3. Click Yes.
Confirm Update	Select how you want to deal with each update.
Confirm Add	Select whether you want to add the card to your Outlook contacts or skip it.

9. When the export process is complete, the **Synchronisation results** window appears.



10. Review the results.

Summary field	Description
x contacts added	The number of new contacts added to your Outlook contacts.
x contacts updated	The number of Outlook contacts updated to match the details in your AccountRight cards. Note that if you selected the Do not update existing contacts rule, updated duplicate contacts will always be 0.
x contacts skipped, x contacts rejected	The number of cards you skipped (if you selected the Ask me to confirm updates rule) or the number of duplicate contacts (if you selected the Do not update existing contacts rule). Duplicate contacts have not been updated to match your AccountRight cards. Note that if you selected the Update existing contacts rule, rejected cards will always be 0.

11. If you want to view the log file that details the exported records, click the link in the **Synchronisation results** window.

Related topics

Synchronising cards with Microsoft Outlook

Importing your Outlook contacts to AccountRight

Outlook Sync Mapping Reference

From the community

Re: Difference between JournalRecords and GeneralJournal

Employee cards with licence reminder

Send Personalised letters from AccountRight

Re: AccountRight Premier v19.6 - Automatically Generate Sales invoice from E-PAS

Re: mail merge a word document into MYOB

More »