

## Syncing 2+ Calendar Appointments with Microsoft Outlook

WinTen 2+ provides users the ability to sync WinTen 2+ calendar appointments with a Microsoft Outlook calendar. This syncing ability applies to the following screens in WinTen 2+:

- **Schedule Certifications Screen**
- **Calendar Screen**
- **Schedule Inspections Screen**

When you sync WinTen 2+ Calendar appointments to Outlook, it syncs the previous month and 6 months in advance. Syncing works if you add an appointment or delete an appointment. For example, suppose you schedule a tenant interview in the WinTen 2+ Calendar and then sync it to your Outlook calendar. Later in the week, the tenant calls your office to cancel the appointment. If you delete the appointment in WinTen 2+ and sync to Outlook again, that appointment will be removed from your Outlook calendar.

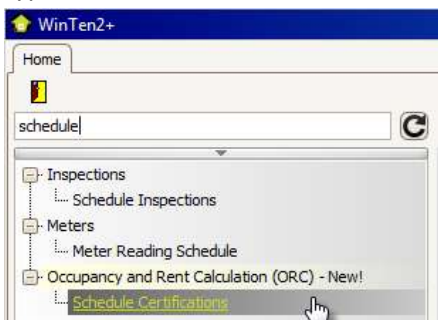
*Note: The WinTen 2+ sync feature is one-directional. Users can only sync items from the WinTen 2+ calendar to their Outlook calendar. Users cannot sync Outlook appointments to their WinTen 2+ calendar currently. Syncing WinTen 2+ appointments with Outlook does not affect any existing Outlook appointments accepts those previously synced from WinTen 2+.*



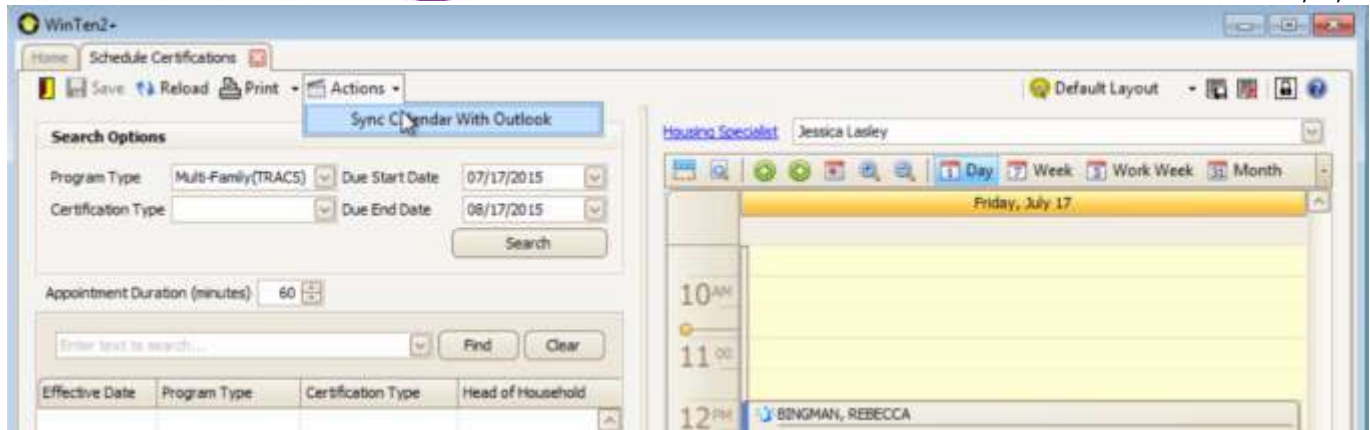
**Important! Outlook must be running on your machine prior to syncing. Attempting any of the sync actions without first opening Outlook will prohibit any syncing from occurring.**

### Sync Appointments from the Schedule Certifications Screen

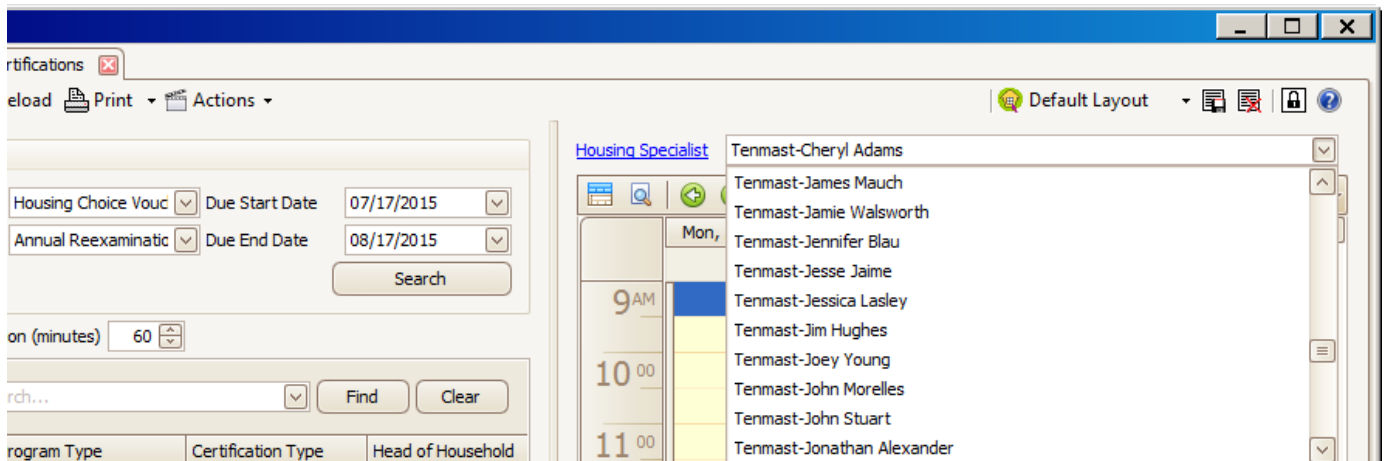
1. Type 'schedule' in the **Search** menu on the **Home** tab and click on **Schedule Certifications**.



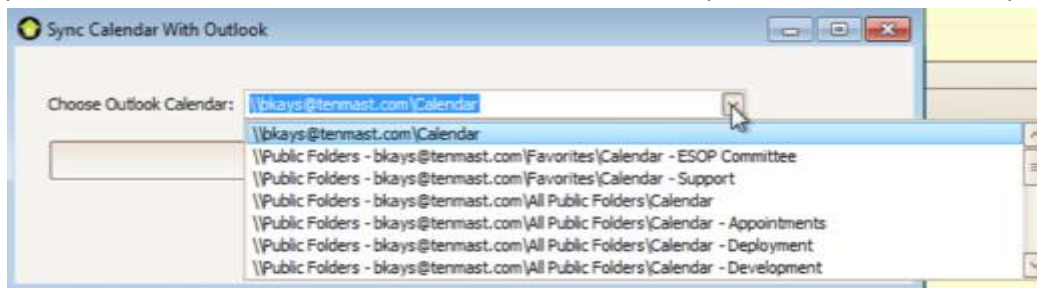
2. Select the **Program Type**, **Certification Type**, **Due Start Date**, and **Due End Date** in the **Search Options** table. Click **Search**.
3. Locate a tenant from the **Search** results on the left-hand side of the screen and drag the selection to the Calendar and release. Right-click on the appointments to make additional edits.
4. Click the big **Actions** button and choose **Sync Calendar with Outlook**.



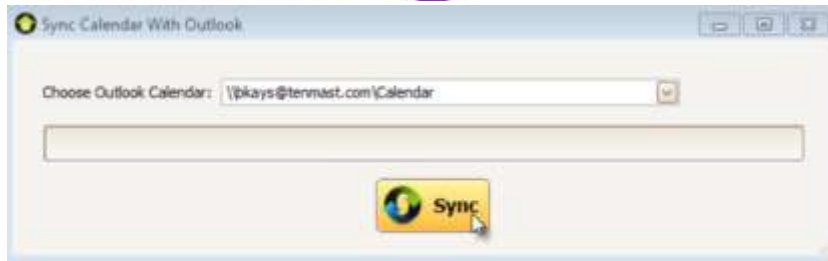
*Note: You can sync an appointment from any calendar that you have access to. Click the drop-down arrow next to **Housing Specialist** to view the available calendars.*



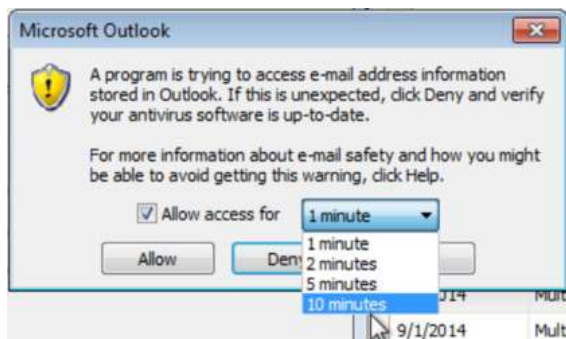
5. The **Sync Calendar with Outlook** window opens. You can sync the WinTen 2+ Calendar with any Outlook calendars you have access to. Click the **Choose Outlook Calendar** drop-down arrow and make your selection:



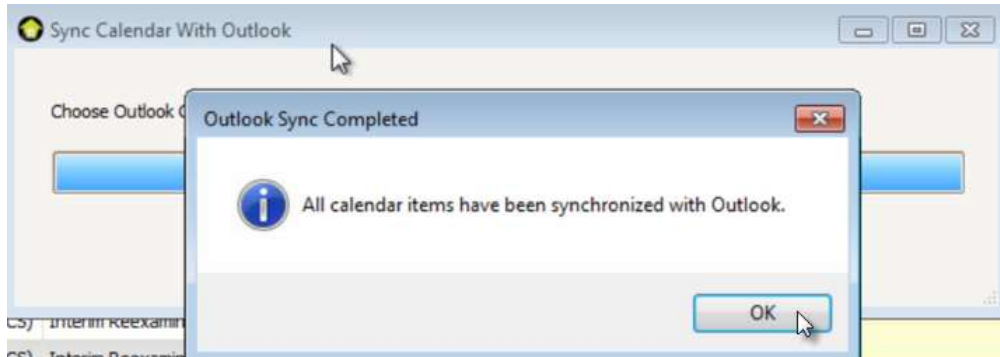
6. Make your Calendar selection and click **Sync**.



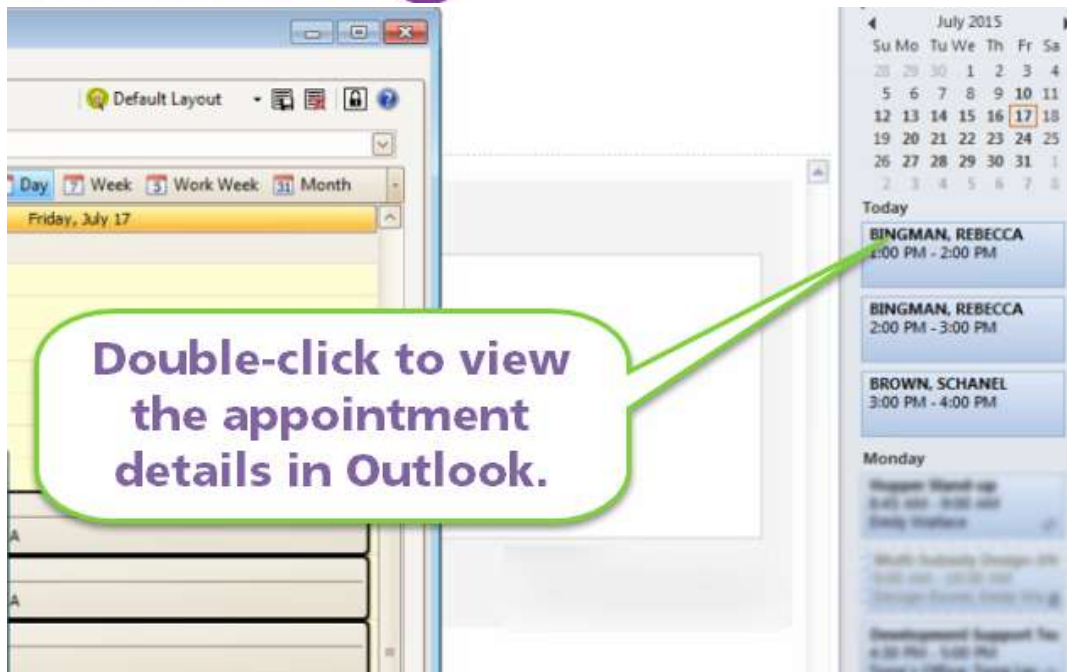
7. A **Microsoft Outlook** security dialog appears. Outlook will confirm that you allow 3<sup>rd</sup> party access. To prevent the security dialog from appearing every time, check the **Allow Access for** box and choose **10 minutes** from the drop-down menu. Click **Allow** to continue.



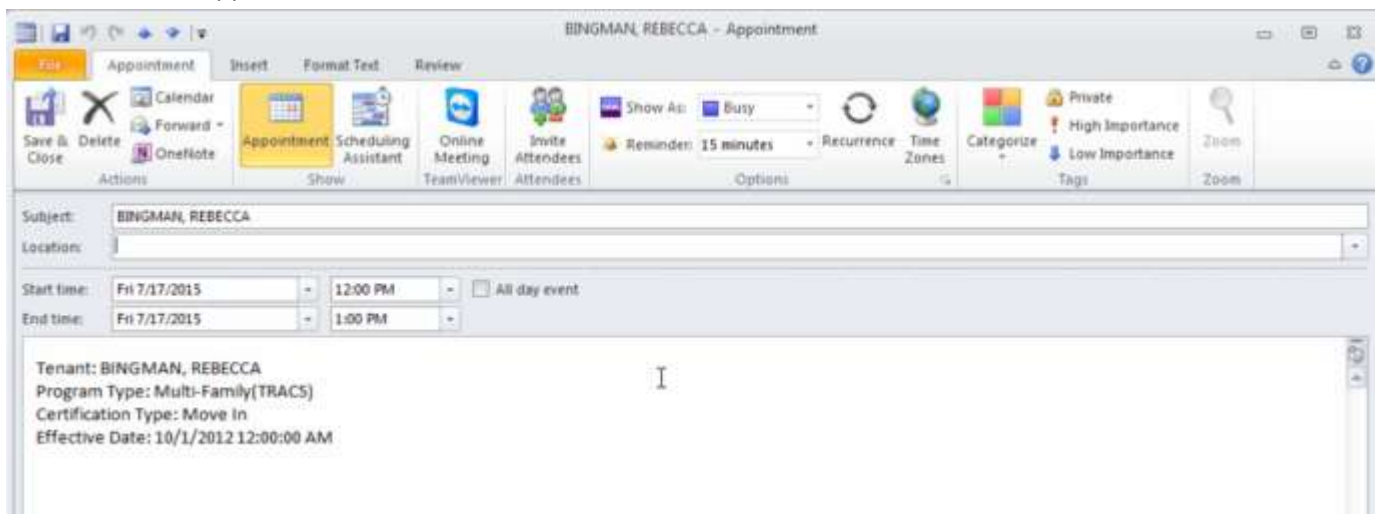
8. Click **OK** once the sync is complete.



9. Return to Outlook. The appointment now appears in your calendar.

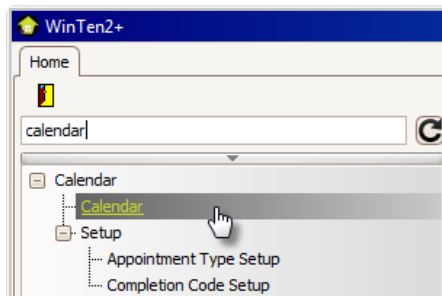


10. Double-click the appointment to see its details.

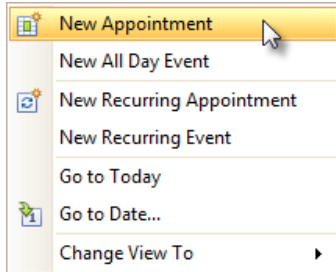


## Sync Appointments from the Calendar Screen

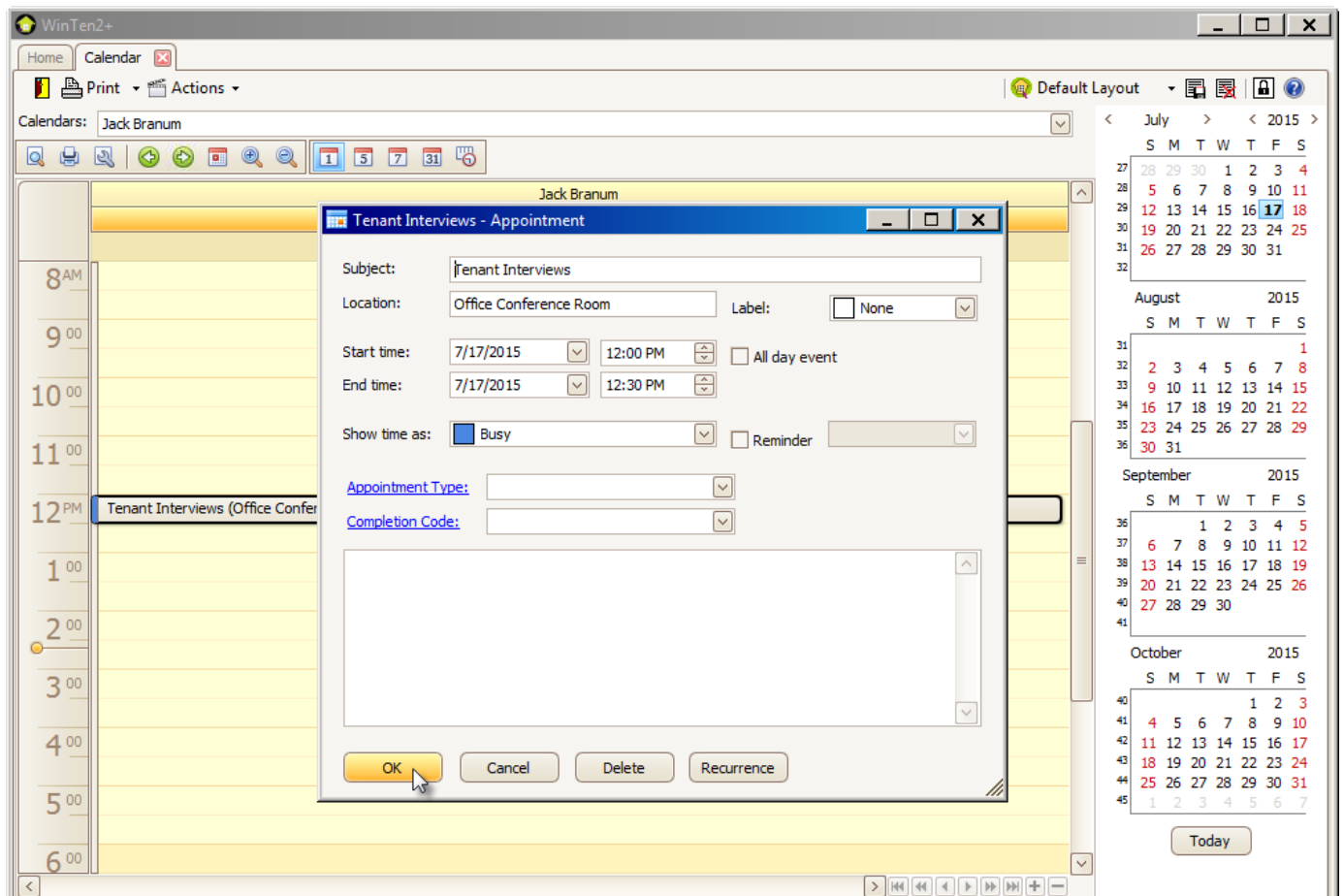
11. Type 'calendar' in the **Search menu** on the **Home** tab and click **Calendar**.



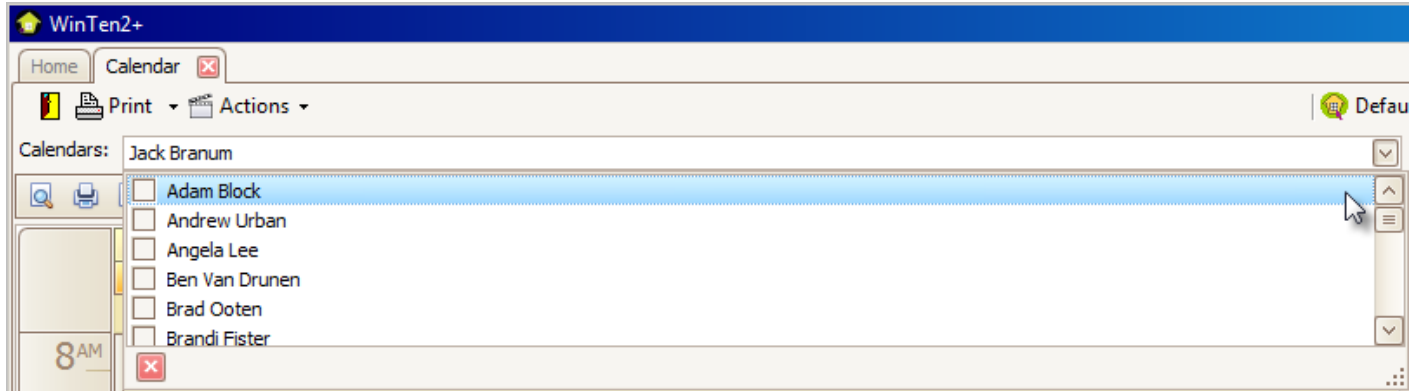
12. Right-click inside the calendar and choose **New Appointment** from the popup menu.



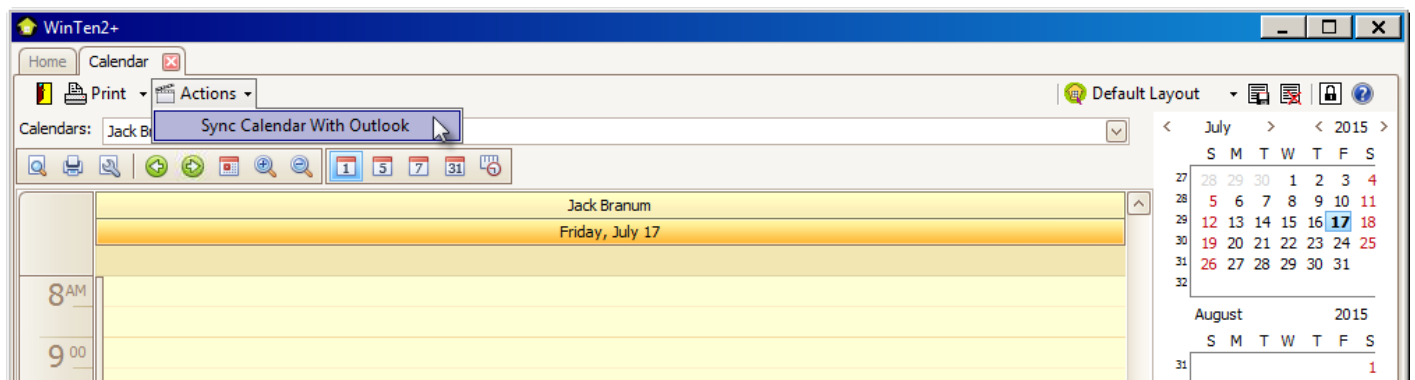
13. Fill in the appointment details and click **OK**.



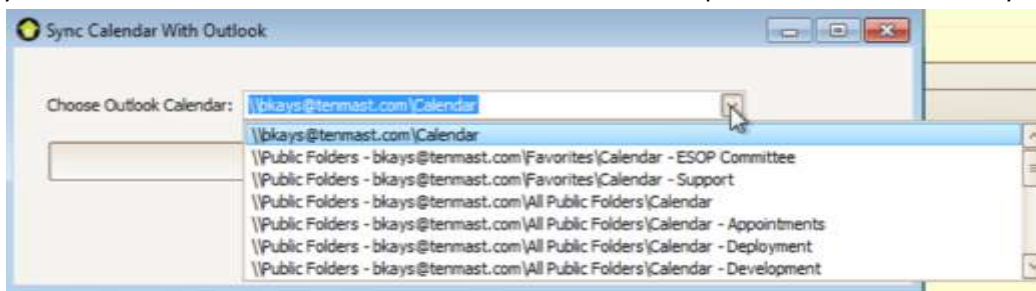
*Note: You can sync an appointment from any calendar that you have access to. Click the drop-down arrow next to **Calendar** to view the available calendars.*



14. Click the big **Actions** button and click **Sync Calendar with Outlook**.



15. The **Sync Calendar with Outlook** window opens. You can sync the WinTen 2+ Calendar with any Outlook calendars you have access to. Click the **Choose Outlook Calendar** drop-down arrow and make your selection:

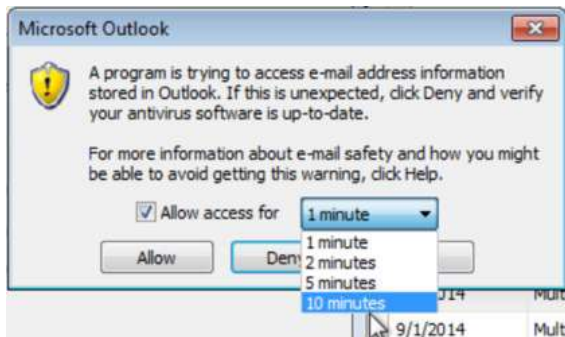


16. Make your Calendar selection and click **Sync**.

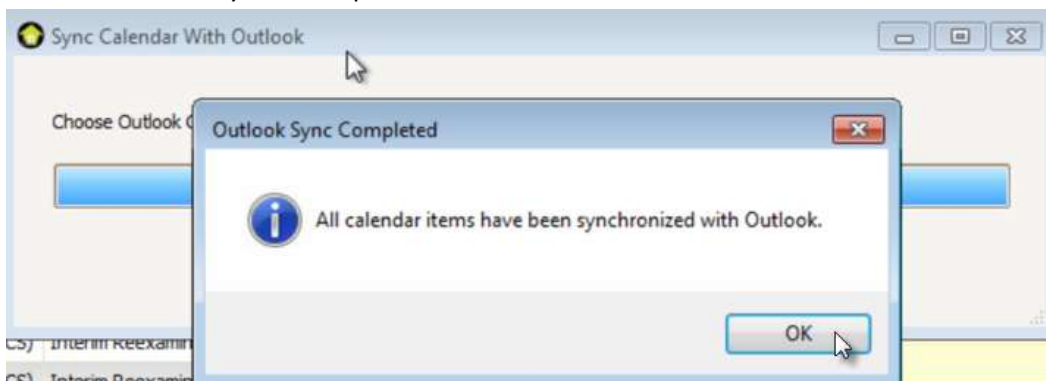




17. A **Microsoft Outlook** security dialog appears. Outlook will confirm that you allow 3<sup>rd</sup> party access. To prevent the security dialog from appearing every time, check the **Allow Access for** box and choose **10 minutes** from the drop-down menu. Click **Allow** to continue.



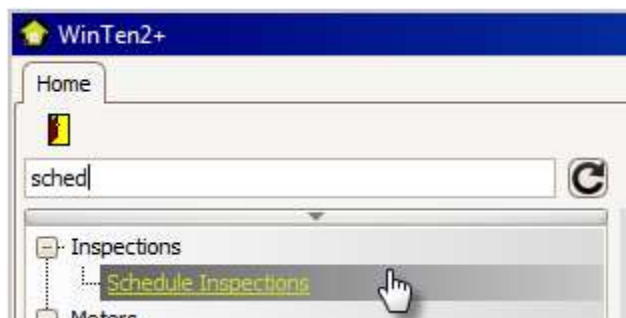
18. Click **OK** once the sync is complete.



19. Return to Outlook. The appointment now appears in your calendar.

## Sync Appointments from the Schedule Inspections Screen

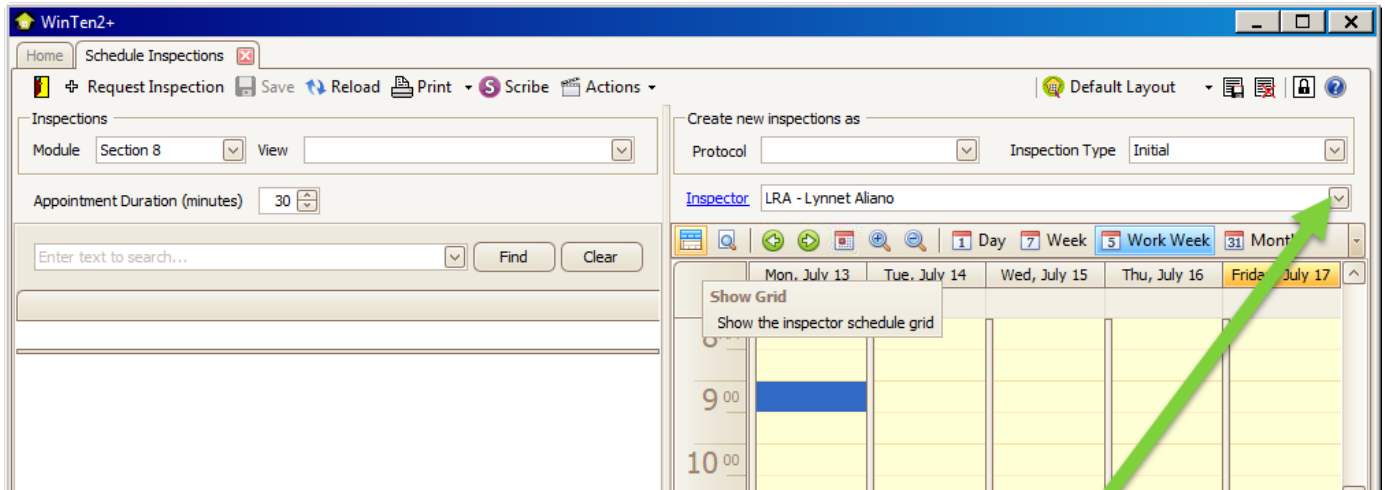
20. Type 'schedule' in the **Search menu** on the **Home** tab and click on **Schedule Inspections**.



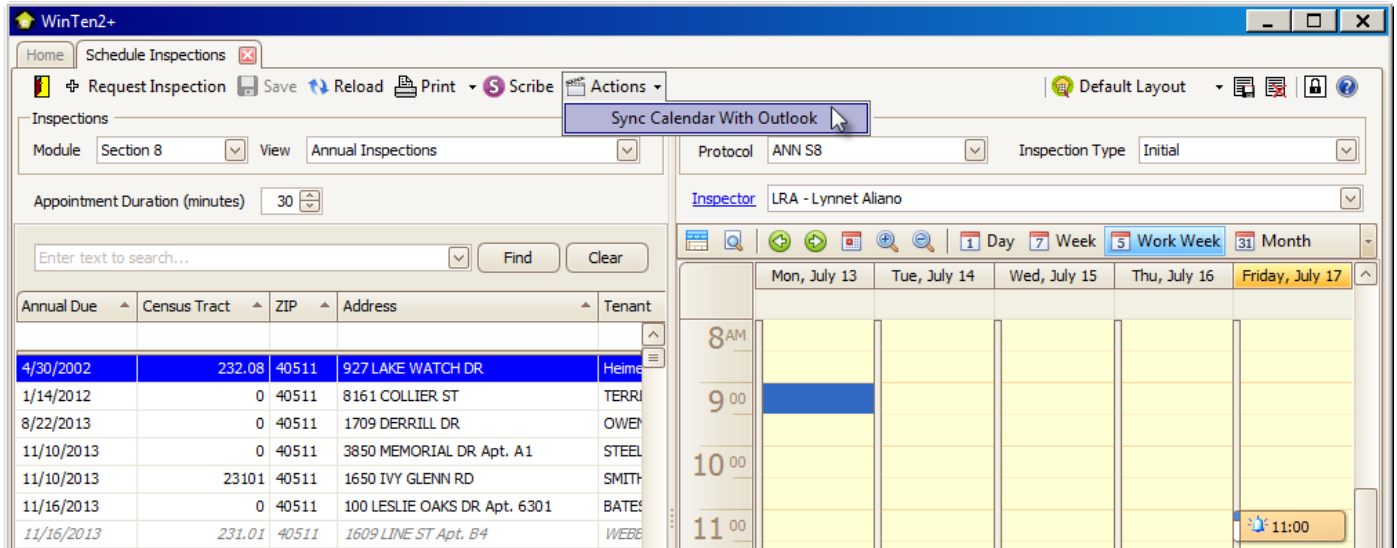
21. Select the **Module** and **View** in the **Inspections** options. Click **Find**.

- If scheduling an existing inspection, select it from the Search results and drag onto the calendar and release.
- If creating a new inspection, select the **Protocol**, **Inspection Type**, and **Inspector**.

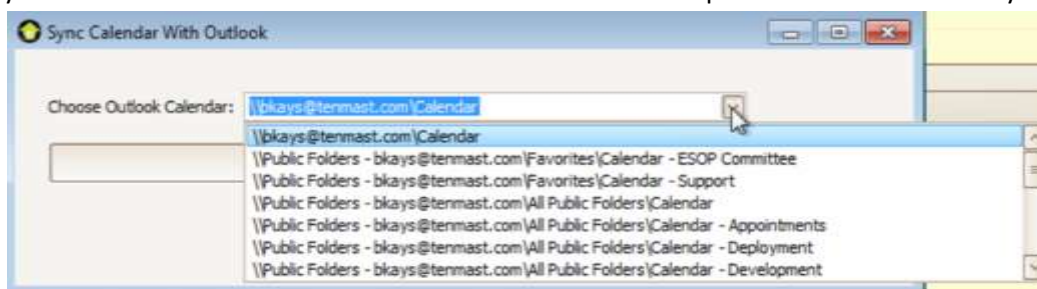
*Note: You can sync an inspections appointment from any **Inspector** calendar which you have access to. Click the drop-down arrow next to **Inspector** to make your selection.*



22. After scheduling inspections, click the big **Actions** button and choose **Sync Calendar with Outlook**.



23. The **Sync Calendar with Outlook** window opens. You can sync the WinTen 2+ Calendar with any Outlook calendars you have access to. Click the **Choose Outlook Calendar** drop-down arrow and make your selection:

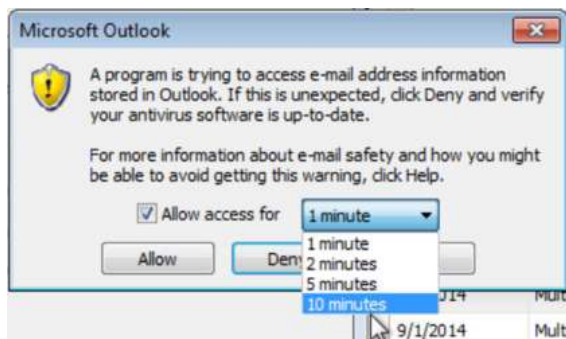


24. Make your Calendar selection and click **Sync**.

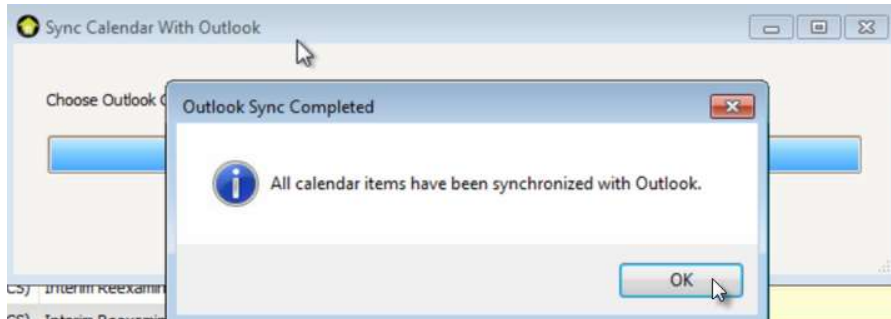




25. A **Microsoft Outlook** security dialog appears. Outlook will confirm that you allow 3<sup>rd</sup> party access. To prevent the security dialog from appearing every time, check the **Allow Access for** box and choose **10 minutes** from the drop-down menu. Click **Allow** to continue.



26. Click **OK** once the sync is complete.



27. Return to Outlook. The appointment now appears in your calendar.