Software Information Bulletin # 52
What’s New in Needles 4.7

1. Microsoft Outlook Integration ................................................................. 2

2. Middle Name Field ............................................................................... 4

3. QuickBooks SDK Interface Now Offers Option to Allow or Not Allow Address Changes to Customers and Vendors. ............................................................. 5

4. QuickBooks SDK Interface Now Links a Needles Name to Both a Customer and a Vendor in QuickBooks. ..................................................................... 6

5. Needles Case Number, Client Name and Memo Field Now Appear on Memo Line of Checks Exported to QuickBooks Using Either the SDK or Windows Interface. ........................................................................................................ 7

6. QuickBooks SDK Interface Issues Resolved in 4.7. .............................. 8

7. New Subject Line Added to Calendar Items. ......................................... 9

8. Calendar Reminders Are Now Set Using Time Intervals. .................... 10

9. New Button on Toolbar. ........................................................................ 10

10. Document Integration with eDrawer. .................................................. 11

11. Select a Specific TAPI Device. ............................................................. 12

1. **Microsoft Outlook Integration.** Needles version 4.7 features a bi-directional interface with Microsoft Outlook (current compatible versions are Outlook 2002 SP3, Outlook 2003 SP3, and Outlook 2007 SP1) which allows **Contacts**, **Calendar** items and **Checklist** items from Needles to be sent between the two programs. PDAs can then be synchronized with Outlook and include information from the Needles database.

   a. **Email** capabilities remain unchanged. Firms may link their Microsoft Outlook email to Needles, allowing them to post emails from Microsoft Outlook directly into Notes in Needles. Email counts will appear on the Needles Today screen.

   b. “**Contacts**” in Needles refer to names and contact information of Parties or Providers. Contacts may be selected for integration by either:

      - individual selection; or
      - based on specific criteria selected under Staff Preferences.

   **Contacts** will synchronize continuously using the rules-based settings specified in Outlook Staff Preferences. Once Needles contacts have been synced with Outlook contacts, any additions or changes to the information in either Needles or in Outlook will be reflected in the other. *(For example, client George Adams recently got a new job, and his work phone number changed. If you change the phone number in George’s file in Needles, that phone number will automatically and instantly be changed in George’s Outlook Contact record.)* You would need to have the proper permissions in Needles in order for your Outlook information to modify Needles information on a contact.

   c. Firms may now link their **Calendar** items in Needles with the Microsoft Outlook calendar. If the calendar item is created in Microsoft Outlook, it must be given a “category” of Needles in order to be added to the Needles calendar. Staff members using the integration may set a preference in Needles to sync calendar items no earlier than a specified date.

   d. **Calendar** items may be created in Outlook and assigned to a case in Needles. Doing so will allow that item to appear in the Calendar for Case report in Needles. This process is similar to the process of Sending and Posting an email from Outlook. Once you create the item, you may click a button to open a Needles search screen. You will choose the case to which you want the item associated and click OK. You will be able to “Go to Case” from the Calendar item in Outlook.

   e. **Calendar** items created on a PDA will not be assigned to a case in Needles until the PDA has been synchronized to Outlook and from Outlook, the items can then be assigned to a Needles case.

   f. Needles open **Checklist** items may be sent to the Outlook **Tasks** and be viewed on a handheld device. You do not have the ability to mark an Outlook task “Done” and have that item be marked “Done” in Needles as well. However, you may edit the description of the task in Outlook and that description will be
instantly updated in Needles. Therefore, you could add the word “DONE” to the description of the Task in Outlook.

g. Synchronization to Microsoft Outlook from Needles can be done to any folder in Microsoft Outlook, Public or Personal. An example of a folder in Microsoft Outlook is the Inbox. If desired, separate folders can be created in Microsoft Outlook that can be used exclusively for Needles Calendar items, Tasks and Contacts.

h. To the best of our knowledge, the following handheld devices will link with the compatible versions of Outlook (Outlook 2002, SP3 and Outlook 2003, SP2):

   - Palm
   - BlackBerry
   - Pocket PC
   - Many cellular phones also interface with Microsoft Outlook, thereby providing a means to sync information with Needles.

i. With each of the three synchronization areas: Calendar, Contacts and Tasks, an Action selection is chosen which will govern how the interface will make changes in Needles and Outlook during the synchronization process.

**Contacts**

- Bi-Directional – Changes and additions from both Needles and Outlook will be sent. Deletions from Outlook will NOT delete a party or provider from Needles; only the link will be deleted. However, if the item is deleted from Needles, it will be deleted from Outlook.

- Needles Sends To Outlook – Changes and additions in Needles will be sent to linked items in Outlook;

- Outlook Sends To Needles – Changes and additions in Outlook will be sent to linked items in Needles. Deleting a contact from Outlook will NOT cause the linked party or provider in Needles to be deleted as they may be attached to cases.

**Calendar**

- Bi-Directional Without Delete – Changes and additions from both Needles and Outlook will be sent. Deletions from Outlook will NOT be deleted from Needles; however, if the item is deleted from Needles, it will be deleted from Outlook.

- Bi-Directional With Delete – Changes, additions and deletions from both Needles and Outlook will be sent to the other program;

- Needles Overwrites Outlook – Changes and additions in Needles will be sent to linked items in Outlook;

- Outlook Overwrites Needles – Changes and additions in Outlook will be sent to linked items in Needles.
Task

- Bi-Directional – Changes in the Outlook Task subject will overwrite data in Needles checklist descriptions on linked items being synced. Changes and additions (new checklist items) in Needles will overwrite the data in Outlook. Marking a checklist item “DONE” in Needles will delete the Task from Outlook.

- Needles Sends To Outlook – Changes and additions in Needles will be sent to linked items in Outlook. Marking a checklist item “DONE” in Needles will delete the Task from Outlook.

These action items can be set separately by staff as well as by sync area.

See Appendix I: Needles Outlook Integration Guide from the Needles manual for more information

Wished For By: Many Needles Clients

2. Middle Name Field. In Needles 4.7, you have the ability to enter the full middle name (up to 20 characters) for a Party or Provider in Needles. You may select a middle initial or middle name parameter when creating merge documents, pdf documents, or customized settlement memos.

See Section 2, Chapter 9 (Providers) and Section 3, Chapter 3 (Parties) of the Needles manual for more information.

Wished For By: Babcock Law Firm LLC; Brown, Brown & Young; Chappell, Smith & Arden; Gordon, Feinblatt, Rothman, et al.; Ted Greve & Associates; Jones Martin Parris & Tessener; Spence Law Firm
3. **QuickBooks SDK Interface now offers option to allow or not allow address changes to Customers and Vendors.** You now have the ability to choose whether changes to Customers and Vendors in QuickBooks and Parties and Providers in Needles will update each other automatically when using the SDK Interface.

![Screenshot of software properties window](image)

*See Section 1, Chapter 3 of the Needles manual for more information.*
4. **QuickBooks SDK Interface now links a Needles Name to both a Customer and a Vendor in QuickBooks.** When creating a check, if the Payee is a party in any case, Needles will check to see if the name is a party in the current case. If it is a party in the current case, a Vendor **will not** be created. If the Payee is not a party in the current case, a Vendor **will** be created.

See Section 1, Chapter 3 of the Needles manual for more information.
5. **Needles Case Number, Client Name and Memo Field Now Appear on Memo Line of Checks Exported to QuickBooks Using Either the SDK or Windows Interface.** The Needles Case Number, Client Name and Memo field will appear on the Memo line of your QuickBooks check once exported from Needles. When using the SDK bi-directional interface and selecting the option to print one check for a payee, the memo line will be blank and the check stub/voucher will contain the Needles Case Number, Client Name, and Memo field for each transaction on that check.

a. Deposits for all amounts will now go over to QuickBooks. Previously, only deposits that had 0 cents would go over due to a problem with carrying out the decimal places too far with deposits that contained cents.

See Section 3, Chapter 21 of the Needles manual for more information.
7. **New Subject Line Added to Calendar Items.** The field “Subject” has been added to Calendar items in Needles to facilitate the interchange of information in calendar items when syncing with Outlook, though you do not need to be using the Outlook Interface to make use of the new field.

    ![Calendar Screenshot]

    *See Appendix I: Needles Outlook Integration Guide from the Needles manual for more information.*
Software Information Bulletin #52  
What’s New in Needles 4.7

8. **Calendar Reminders Are Now Set Using Time Intervals.** When setting a reminder for a Needles calendar item, rather than setting a specific date and time, you will now click on the drop-down to choose the time interval prior to the appointment. This will help to ensure that reminders will function properly between Outlook and Needles.

![Calendar Reminder](image)

*See Section 4, Chapter 1 of the Needles manual for more information.*

9. **New Button on Toolbar.** There is now a new button on the toolbar that links directly to the Needles website (www.Needses.com).

![Toolbar Button](image)

*See Section 1, Chapter 4 of the Needles manual for more information.*
10. **Document Integration with eDrawer.** Needles now has the capability to integrate with eDrawer document management software using the Needles document tab.

![Image of Needles Properties window showing document manager set to eDrawer with options for default alternate case numbers and save file to G:\Clients]

*See Section 1, Chapter 3, subsection 3.1.5.4 of the Needles manual for more information.*

*Wished For By: Farrin Law Office*
11. **Select a Specific TAPI Device.** Bypass the Windows Phone Dialer when using the Needles dialing feature by selecting a specific TAPI Device for each staff person. This is particularly useful when accessing Needles via a Terminal Server installation.

![Select TAPI Device](image)

*See Section 2, Chapter 4, subsection 4.8.5 of the Needles manual for more information.*

*Wished For By: Keller & Keller; Allen, Allen, Allen & Allen*

12. **Needles Manual.** Access the Users Manual by clicking on **Help > Needles Help** from the Needles menu. Each chapter is also available in PDF format on our website for downloading and printing.