



How to use the Partner XE Outlook Plug-In

The Partner XE Outlook Plug-in allows for two way integration between Partner XE and Microsoft Outlook. This integration requires the user to have Microsoft Outlook 2007 or higher.

NOTE: The Outlook Plug-In must be installed to use this feature. This feature is a separate install from any Partner XE upgrade.

Connect to Parl	tner XE		
Pd	rtne	XE	
Username:	SISADMIN	[
Password:	XXX	[
Connect To:	<u>MI-2</u>		•
		Connect	Cancel ///

Partner XE Outlook Plug-in will now handle multi-entity – when you sign into outlook and choose the entity, the search will be for that entity only.

2010 Microsoft Outlook

- 1. Click on the last tab labeled Add-Ins.
- 2. Click on Partner XE.
- 3. Click on Status to verify plug-in is working.
- 4. Click on Options to setup plug-in for your agency.





2007 Microsoft Outlook

- 1. Click on Partner XE on the tool bar.
- 2. Click on Status to verify plug-in is working.
- 3. Click on Options to setup plug-in for your agency.

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	View	
0 📑 🄊 📼	Inbox - cshaw@sisware.com - Microsoft Outlook	Ē
File Home Partner XE =	Send / Receive Folder View Add-Ins	
Menu Commands	·	
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Partner XE/Add-in

Setup these options for your agency. All items will default with the exception of the 'Show client details in emails'.

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<u>Status</u>

If plug-in or calendar does not seem to be working check the 'Status'. If any of them display 'Disabled' double click on it and an error message will display. Provide the message to SIS Service (<u>service@sisware.com</u>) to assist in the analysis.

artner XE (Yersion: 1.7.0.31)			
Logged into YOUNG ISAAC - Test Files as SISADMIN			
Calendar Sync:			
Last Attempt:	11/20/2011 12:53:06 PM		
Last Success:	11/20/2011 12:53:06 PM		
Context Menus:	Enabled		
Folder Monitoring:	Enabled		
Category:	Enabled		
ОК			

Options

Partner XE Settings				
Automatically add incoming mail to Partner XE.				
Automatically add sent mail to Partner XE.				
Sync Partner XE Calendar to Outlook.				
✓ Prompt to set document description when manually adding emails to Partner ×E.				
✓ Prompt to set document descriptions when adding a folder of emails to Partner ×E.				
Show Client Details In Emails				
Show in reading pane				
Show in open email window				
OK Cancel				

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Automatically add incoming or sent email:

- To automatically add emails from incoming and sent folders the options box must be checked in both places and the address book must have the email address with the 'auto add-in' box checked.
- The message will be flagged with a green category stating 'Message has been sent to Partner XE'. This applies to both in-box and sent items.
- When you open up an email to read, it will also show a green line stating 'Message has been sent to Partner XE'.
- If you choose to manually add only those emails to Partner XE, it will also show the green category 'Message has been sent to Partner XE'.

⊠ ⊒ ⊓ ೮ ▲ ♥ -	Outlook Plug In - Message (HTML)	_ 0
File Message		۵ (
kan	👼 To Manager 💿 💻 👰 OneNote 🚦	Mark Unread Categorize * Follow Up * Tags © Editing Zoom
You forwarded this message on 12/1/2011 8:47 PM.		
Message has been added to Partner XE		
From:]John <john@hsgr.com> To: Cathy Shaw Cc:</john@hsgr.com>		Sent: Thu 12/1/2011 6:38 P
Subject: Outlook Plug In		
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NOTE: Automatic add-in will only attach to `clients' and if you have one email attached to multiple clients it will attach to the first client it finds.





Manually add email into Partner XE:

- Highlight the email message you wish to add to Partner XE
- Right click on the message
- At the bottom it states 'Add to XE' (Search)
- Click on this option and the Search box will pop up.

Sync Partner XE Calendar to Outlook

The calendar in Partner XE will sync every 5 minutes. This is a one way synchronize, from Partner XE to Outlook. Any meeting or reminder will add to Outlook calendar when entered in Partner XE. The Calendar will synchronize with 14 days of today's date. For example, an appointment 3 weeks from today; will not synchronize with the Outlook Calendar until 14 days prior to it being effective.

<u>Search</u>

Clients 💌				Go
Clients Contacts Individuals	Name	Client ID	Туре	St
•				





- The search box has been revised to include Clients, Contacts and Individuals.
- You can attach emails to client, individuals, policies, claims and documents groups.
- Search is based on how user preferences have been setup. I.E. show active clients only or all policies including inactive.

Add Email

Once you click on the 'add' button a pop-up box will display:

Document Description				
Specify the description to use for this email in Partner XE				
Description:				
RE: New updated Plug-in				
🔲 Don't ask again. Always use the email's subject as the description.				
OK				

- At this time, you can change the description of the document that will be added to Partner XE. This will not change the subject line on the email in Outlook.
- There is an option to never show this pop-up box again and you may re-set on the Options box.





Client Details in Email

🖂 🛃 🤊 U 🔺 🗢 I -	RE: New update	ed Plug-in - Mes	sage (HTML)			_ 0 %
Ignore 🔨 🖂 🖼 🥳	Meeting Move to folder M * A To Manager More * Team E-mail Ouick Steps	▼ Move	Pules - OneNote Actions - 10ve	Mark Unread Categorize * Follow Up *	A→ Find → Related → Translate → Select → Editing	© Zoom Zoom
• You replied to this message on 11/20/2011 12:43	3 PM.					
Message has been added to Partner XE From: John <john@hsgr.com> To: Cathy Shaw Cc: Subject: RE: New updated Plug-in</john@hsgr.com>					Sent: Sat	11/19/2011 11:14 AM
CathyI was out Friday afternoon, so will get with you on Monday John C. Heinsz, CIC Heinsz-Schaefer-Ganwiz Insurance F.O. Box 190 St. Charles, MO 63301 636-946-2266 From: Cathy Shaw [mailto:cshaw@sisware.com]						
Sent: Friday, November 18, 2011 1:10 PM To: John Subject: New updated Plug-in						
— PartnerXE Client Information —						
Client Details: F John A Hampton Joann M Hampton m	Policies:				Active Only	•
3335 Nebraska Ave Saint Louis, MO 631184438 Phone: 314-773-2189 Attach Email	Policy Number Z4477980 Z4477980	LOB Proc AUTOP AUTOP	lucer			
See more about: John.						22.

- You can show the client details in the reading pane and/or inside the e-mail.
- From this screen, double click on the policy number and it will open up the Client summary page.
- Change from Active Only policies to 'All Policies'.
- Click on 'Attach Email', this will bring up the search box with the client already shown in the box.

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Sending New Emails

Image: Second	
File Message Insert Options Format Text Review Add-Ins F H N P O V X	∞ 🕜
Attach Document From XE	
Add Recipient From XE	
Partner XE	
То,	
Send Cc	
Subject:	
Cathy Shaw	
Business Systems Analyst Strategic Insurance Software, LLC	
614-219-6070 ext. 122 www.Partnerxe.net	
www.i dittoi.co.iidt	
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- Open up a new email.
- Click on 'Add-Ins' tab.
- Attach a document from XE to the email or
- Add Recipient from XE.

Additional Items

- You can move an entire folder in Outlook to one client, individual, claims, policy or document group. You still will be given the option to change the description of the emails, but note this will change them 'all' to the same description.
- Emails can be attached without a subject line
- Emails will now attach with a long subject line

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