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.

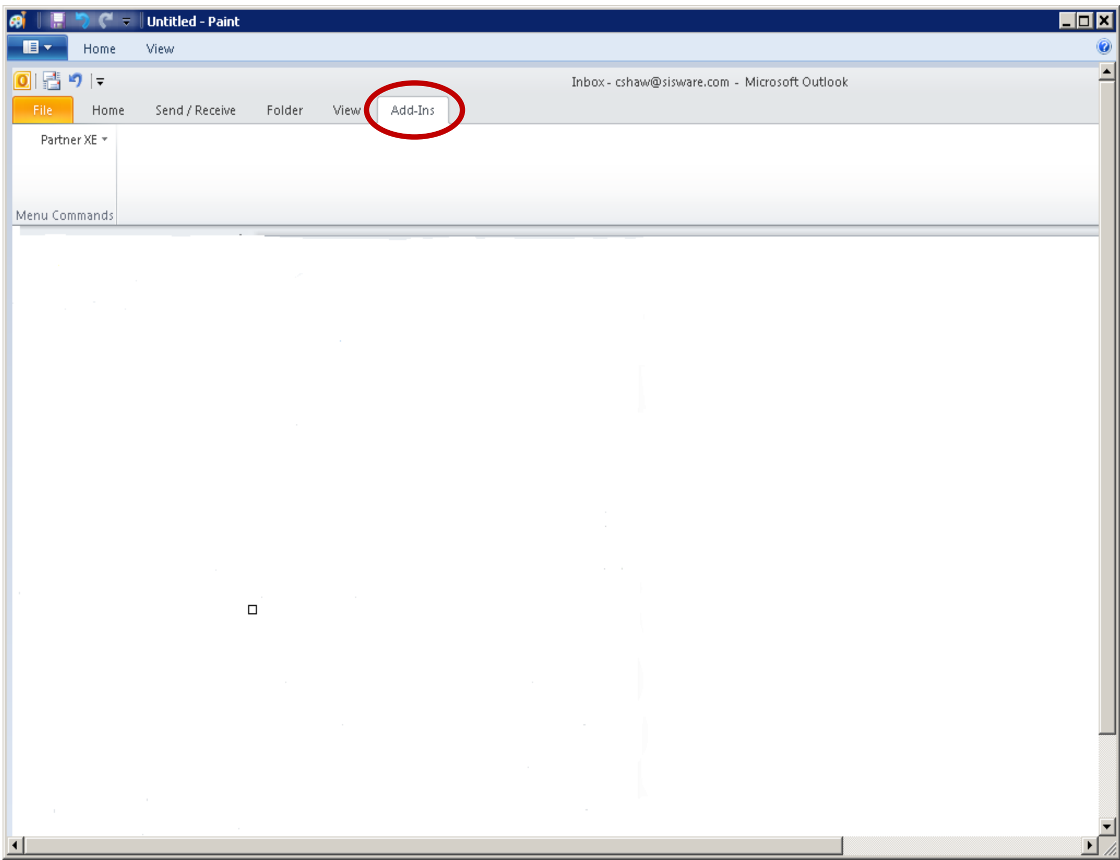
Partner XE Outlook Plug-in will now handle multi-entity – when you sign into outlook and choose the entity, the search will be for that entity only.

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.

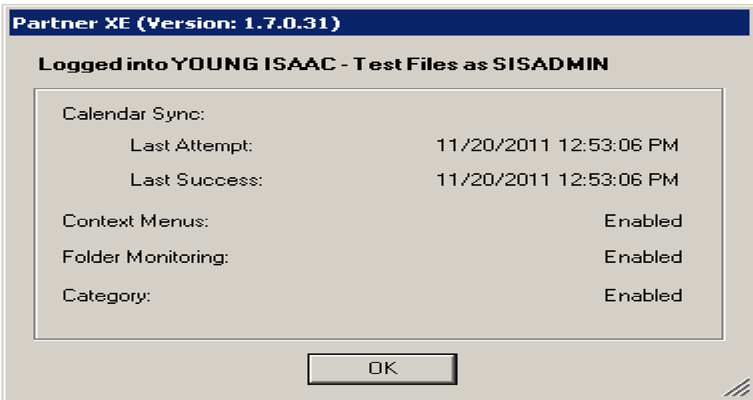


Partner XE/Add-in

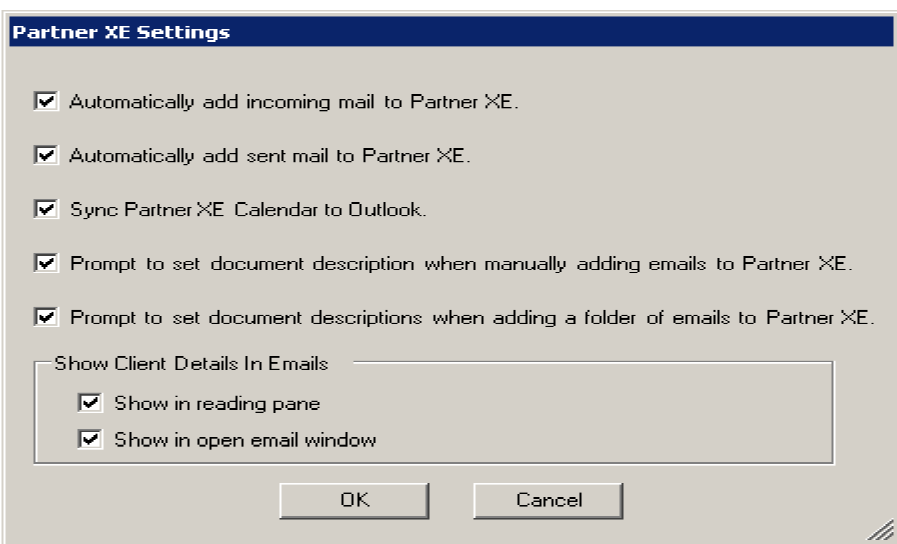
Setup these options for your agency. All items will default with the exception of the 'Show client details in emails'.

Status

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 (service@sisware.com) to assist in the analysis.

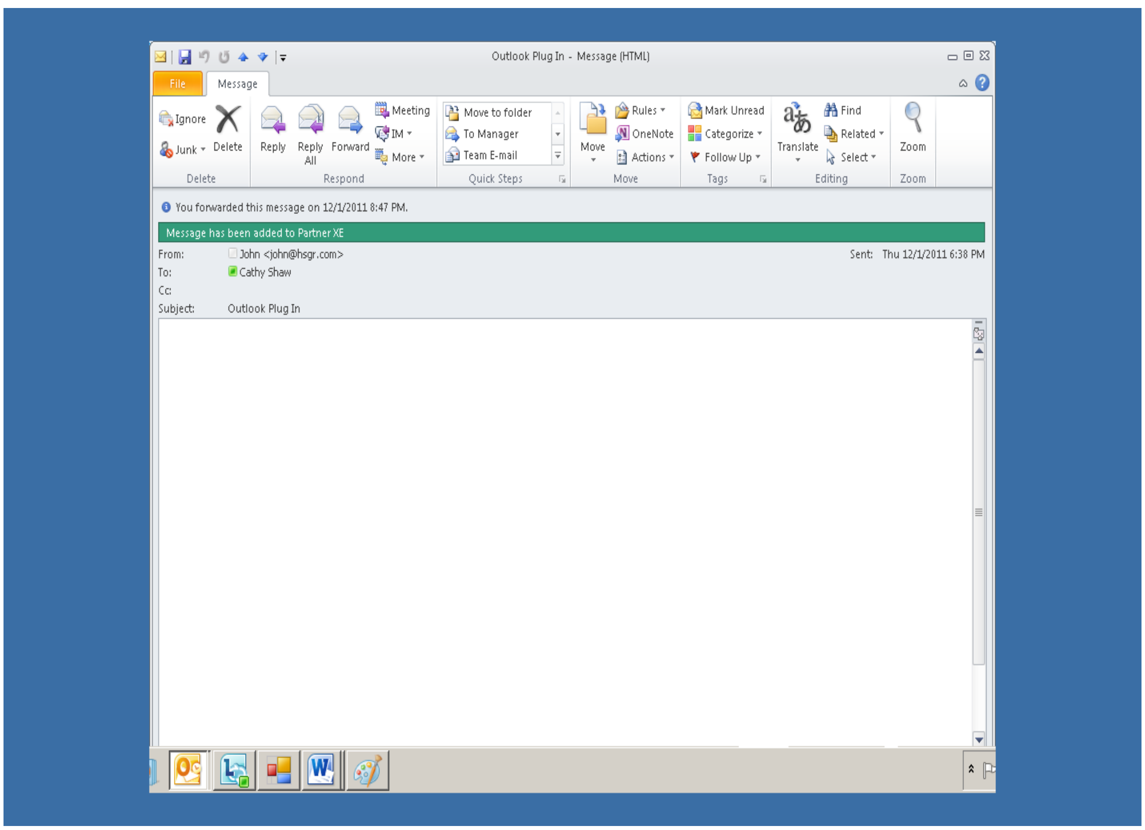


Options



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'.



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.

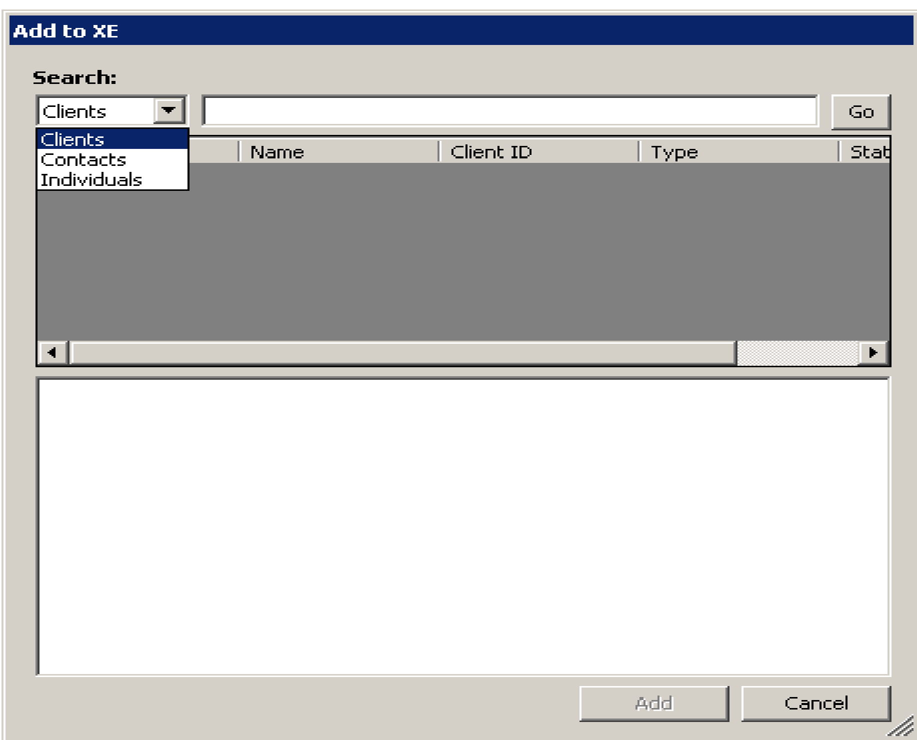
Manually add email into Partner XE:

- 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.

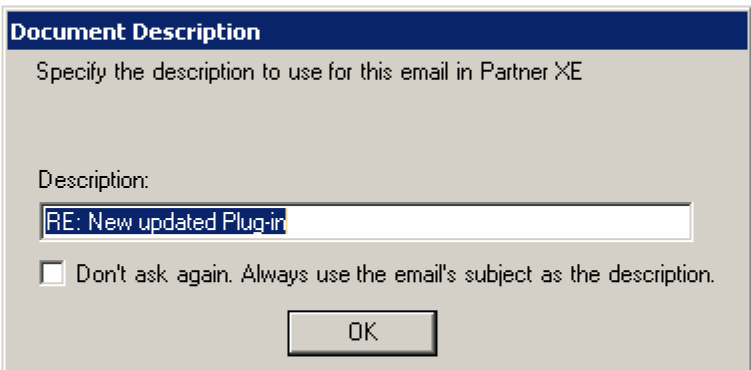
Search



- 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.

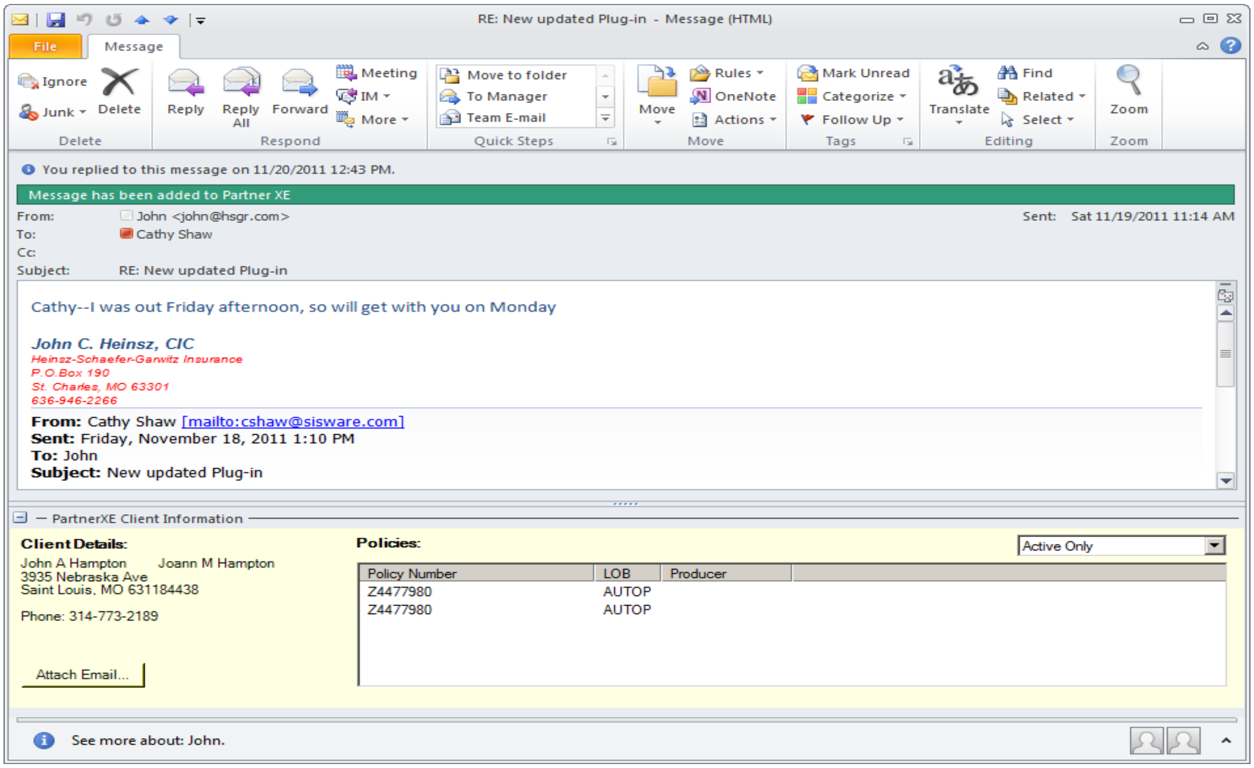
Add Email

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



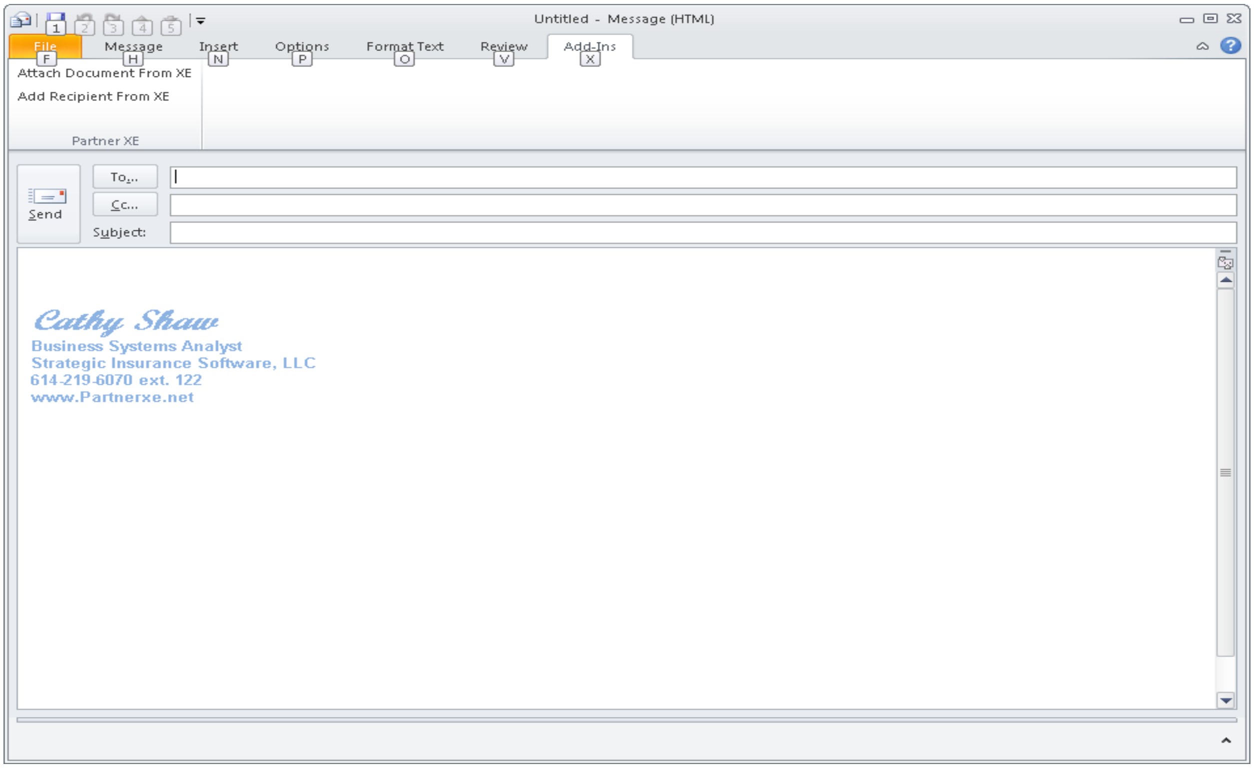
- At this time, you can change the description of the document that will be added to Partner XE. This will not change the subject line on the email in Outlook.
- There is an option to never show this pop-up box again and you may re-set on the Options box.

Client Details in Email



- 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.

Sending New Emails



- 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