partnernet Partner XE by SIS

Partner XE Outlook Plug-In User Guide

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. To install a new version of the Outlook Plug-In, the previous version must be uninstalled.

Contents

Outlook Plug-In Set up 2

2010 Microsoft Outlook 2

2007 Microsoft Outlook 3

Status 3

Options 4

Automatically add incoming or sent email: 4

Sync Partner XE Calendar to Outlook 6

Prompt to set document description when manually adding emails to Partner XE 6

Prompt to set document description when adding a folder of emails to Partner XE 7

Automatically add received date/time to document description 7

Automatically add incoming Receipts from RPost to Partner XE 8

Show Client Details in Email 9

To import contacts into Outlook 10

To send an Email from Partner XE and attach to documents 11

To attach a document from Partner XE into an Outlook Message 13

To add a recipient from Partner XE into an Outlook Message 15

To manually add an email into Partner XE from Outlook 17

To add multiple emails into Partner XE 18

To add a new Client, Contact or Individual from Outlook 19

To add an Outlook folder into Partner XE 20

To monitor Inbox and Sent Items 21

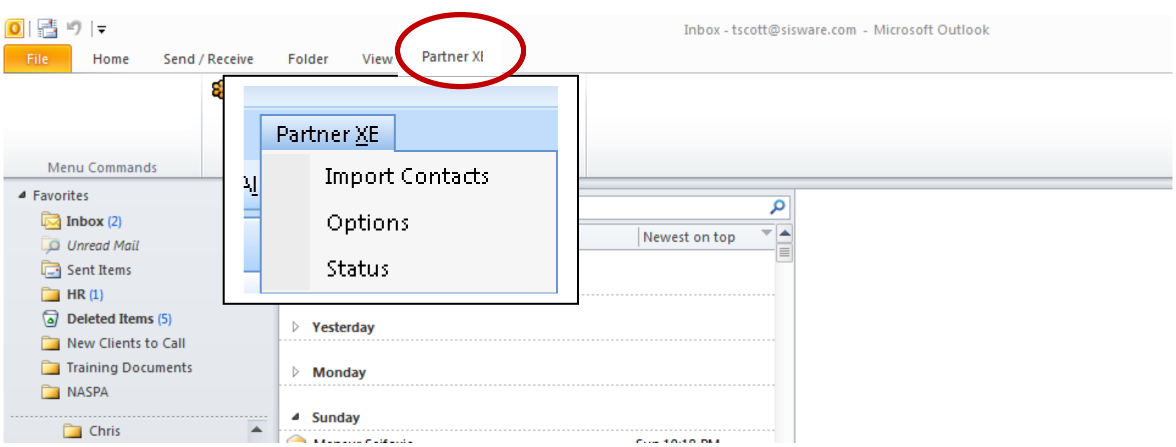
Outlook Plug-In Set up

After installing the Outlook Plug-In, the following screen will appear every time the user logs in.

For agencies with multiple entities, the Partner XE Outlook Plug-in automatically logs into the entity that Partner XE was last logged into.

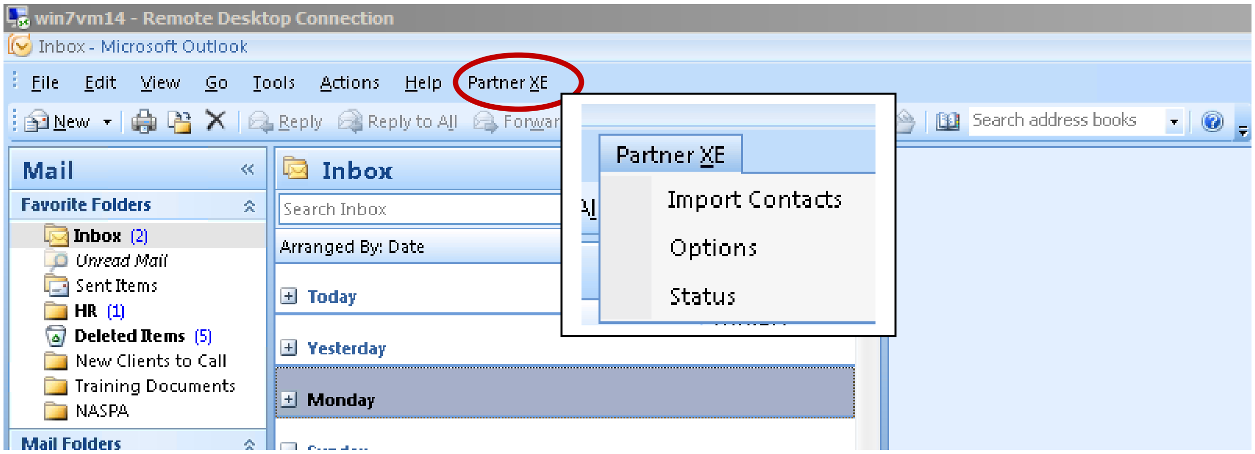
2010 Microsoft Outlook

1. Click on Partner XE on the tool bar.
2. Instructions are available below for the following options:
    a. Click on Import Contacts to import contacts from Partner XE into Outlook.
    b. Click on Options to setup plug-in for your agency.
    c. Click on Status to verify plug-in is working.



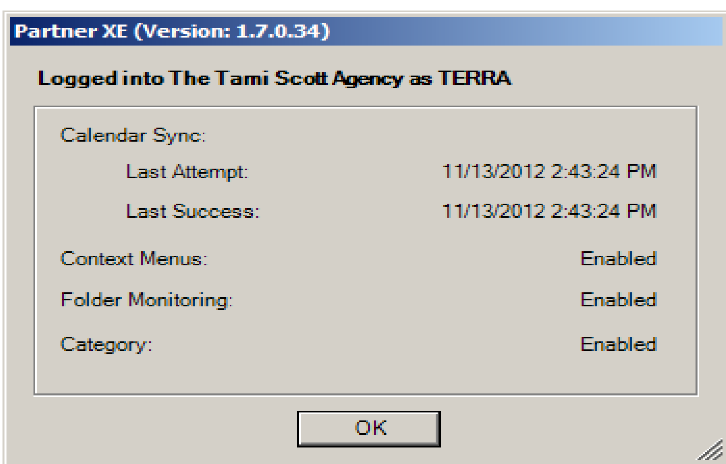
2007 Microsoft Outlook

1. Click on Partner XE on the tool bar.
2. Instructions are available below for the following options:
    a. Click on Import Contacts to import contacts from Partner XE into Outlook.
    b. Click on Options to setup plug-in preferences.
    c. Click on Status to verify plug-in is working.



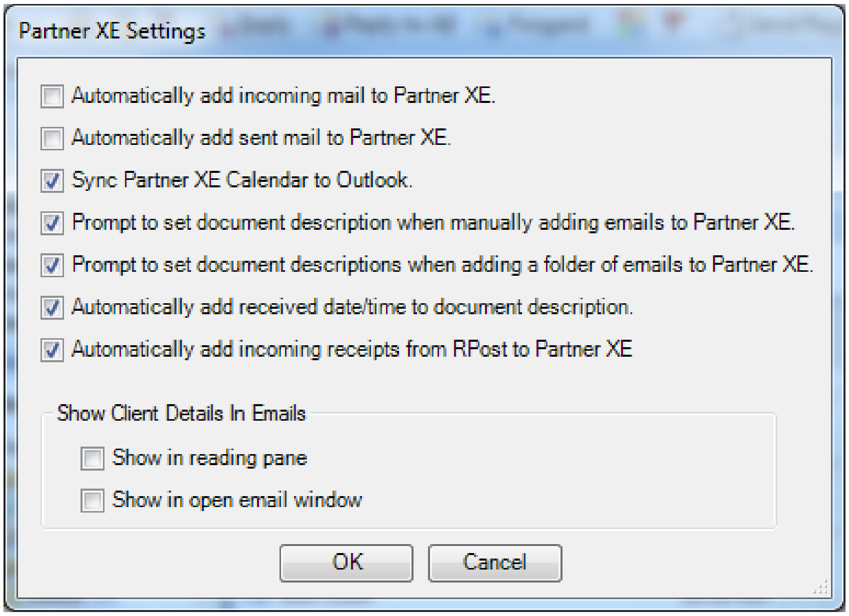
Status

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.



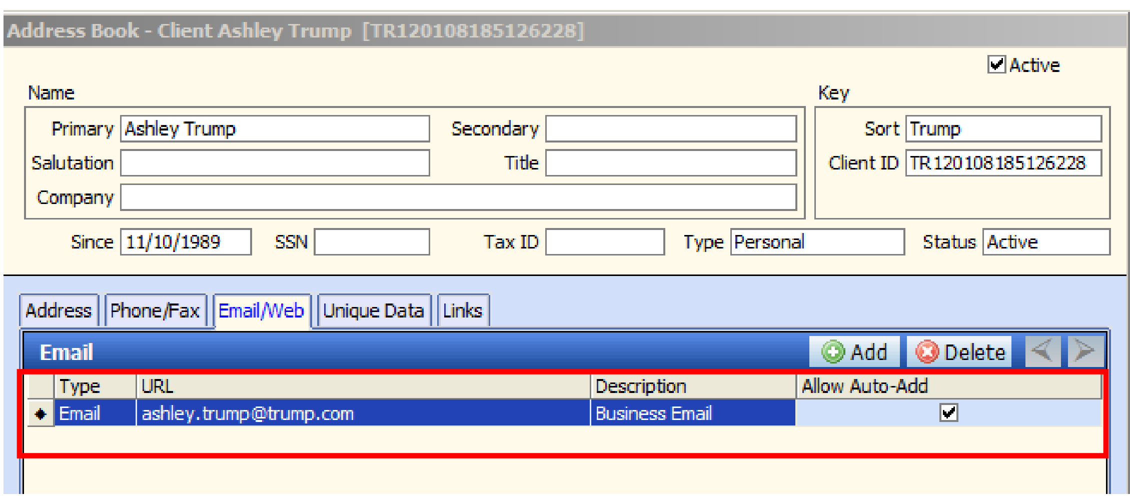
Options

The Outlook Plug-In offers options for Partner XE Settings.

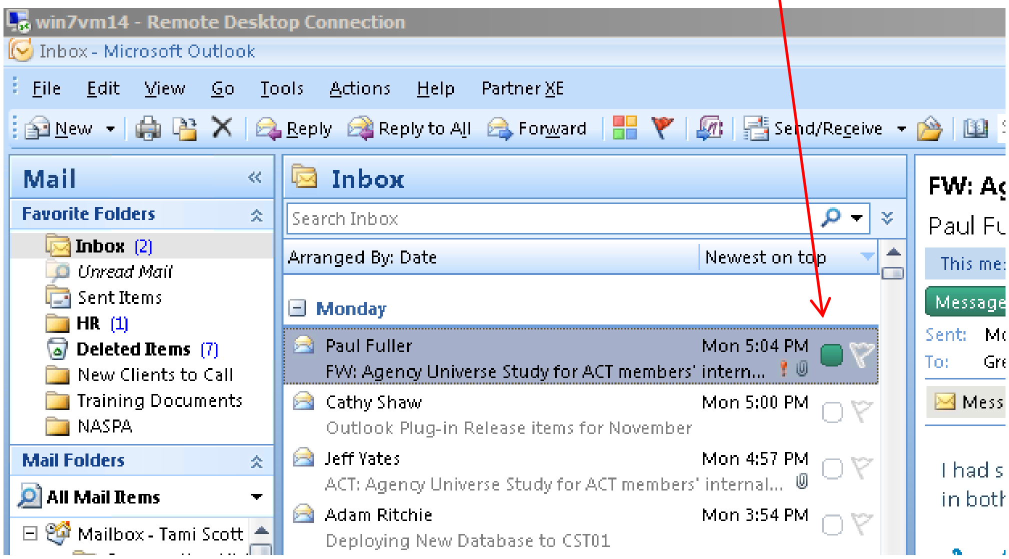


Automatically add incoming or sent email:

- To automatically add emails from incoming and sent folders
  - Options box (above) must be checked in both places (first two options)
  - Address book must have the email address with 'Allow Auto-Add' box checked

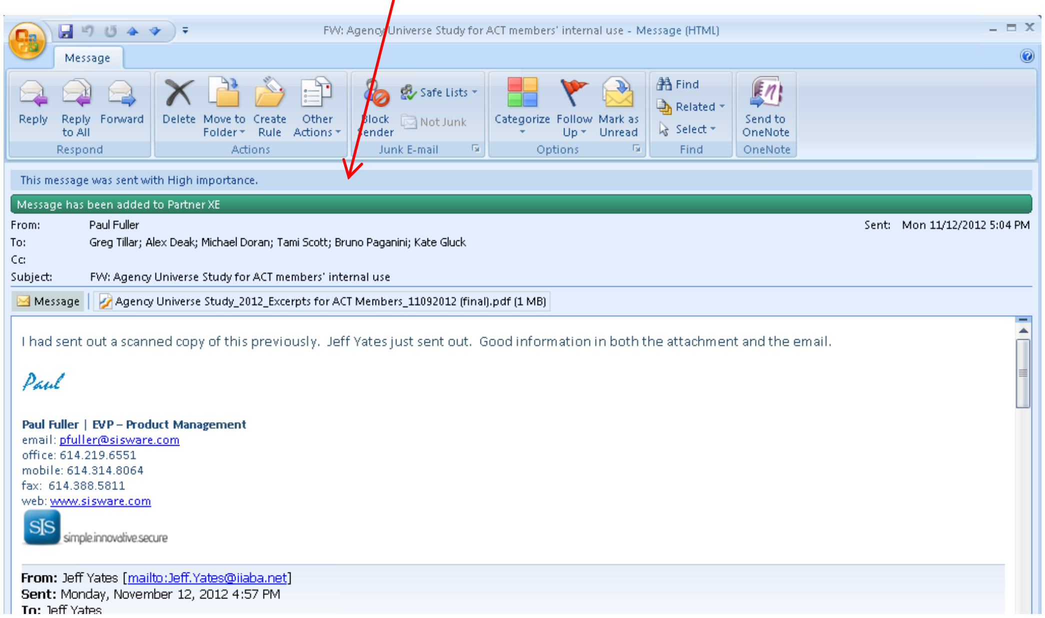


- The message will be flagged with a green category stating 'Message has been sent to Partner XE'. This applies to both Inbox and Sent items.



- If you choose to manually add emails to Partner XE, it will also show the green category 'Message has been sent to Partner XE'.

- When you open up an email to read, it will also show a green line stating 'Message has been sent to Partner XE'.



NOTE: Automatic add-in will only attach to Clients, Contacts and Individuals in Partner XE. If you have an email address attached to multiple clients/contacts it will attach to the first client/contact/individual it finds.

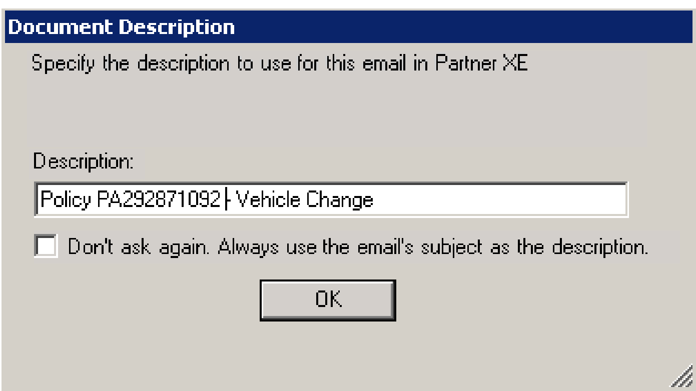
The “automatically add” options will attach **every email sent or received from that email address** to the Client, Contact or Individual in Partner XE. Since these messages are stored as documents, they cannot be deleted from Partner XE once attached (but can be hidden).

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 within 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.

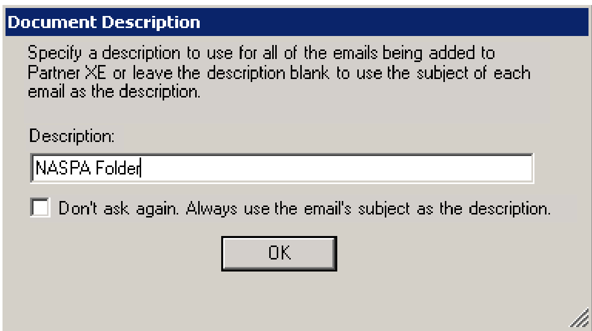
Prompt to set document description when manually adding emails to Partner XE

- If checked, Document Description box appears which allows you to change the description of the email before attaching in Partner XE.
- Also have option to check box - **Don’t ask again. Always use the email’s subject as the description**. This will remove the prompt.

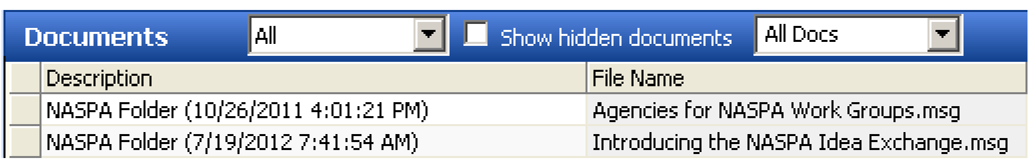


Prompt to set document description when adding a folder of emails to Partner XE

- If checked, Document Description box appears indicating that you can designate a description to identify all the emails in the folder OR if left blank, the subject of each email will be used.
- Also have option to check box - **Don't ask again. Always use the email's subject as the description**. This will remove the prompt.



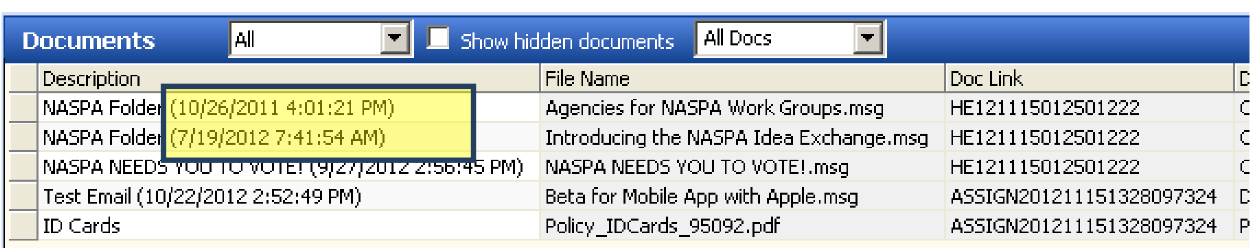
- If a folder name is designated, the folder name will appear in the Description. The email subject will appear in the File Name.



Description	File Name
NASPA Folder (10/26/2011 4:01:21 PM)	Agencies for NASPA Work Groups.msg
NASPA Folder (7/19/2012 7:41:54 AM)	Introducing the NASPA Idea Exchange.msg

Automatically add received date/time to document description

When attaching an email message into Partner XE, the date and time the email was received will be added to the document description.



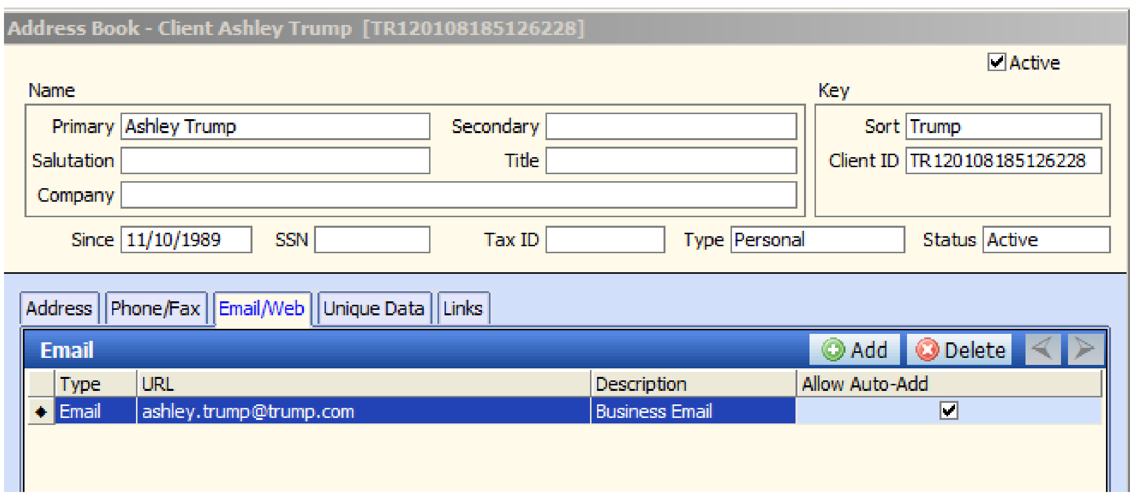
Description	File Name	Doc Link	D
NASPA Folder (10/26/2011 4:01:21 PM)	Agencies for NASPA Work Groups.msg	HE121115012501222	C
NASPA Folder (7/19/2012 7:41:54 AM)	Introducing the NASPA Idea Exchange.msg	HE121115012501222	C
NASPA NEEDS YOU TO VOTE! (9/27/2012 2:56:45 PM)	NASPA NEEDS YOU TO VOTE!.msg	HE121115012501222	C
Test Email (10/22/2012 2:52:49 PM)	Beta for Mobile App with Apple.msg	ASSIGN201211151328097324	D
ID Cards	Policy_IDCards_95092.pdf	ASSIGN201211151328097324	P

Automatically add incoming Receipts from RPost to Partner XE

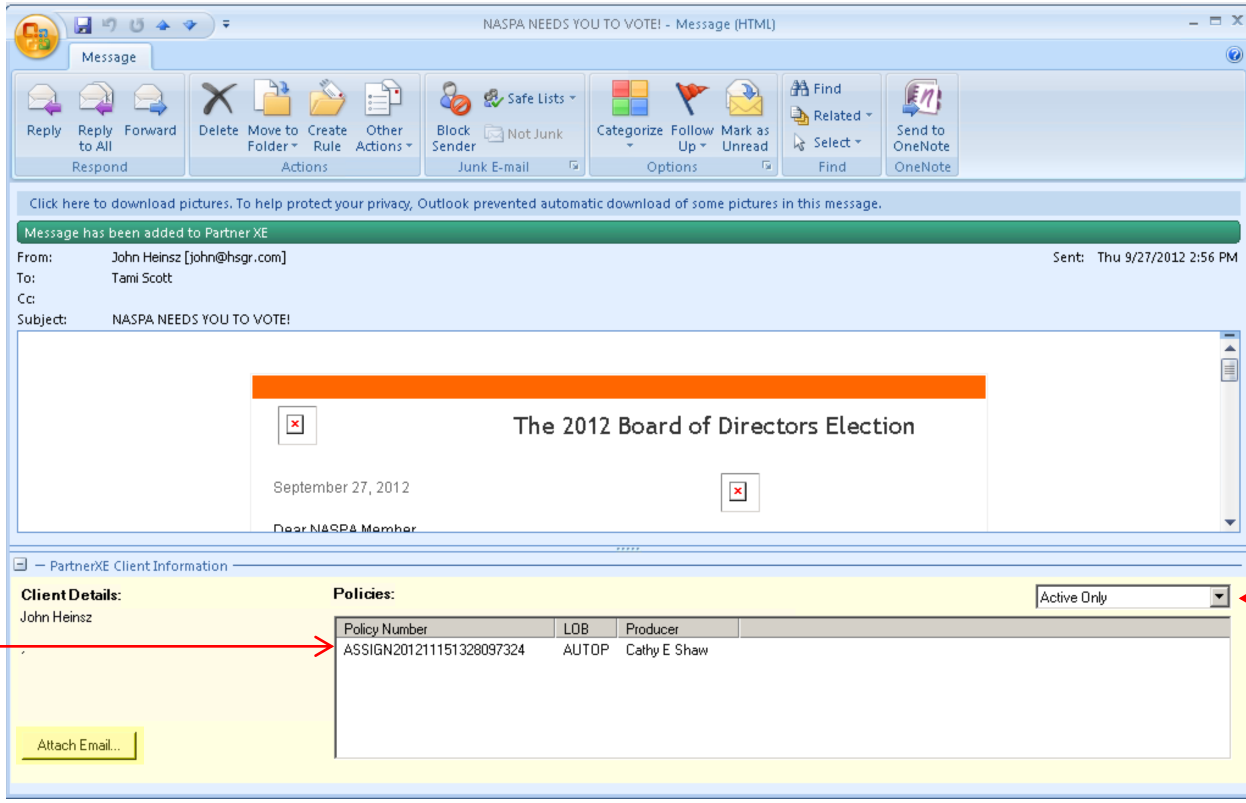
RPost is a service offering registered email, e-signature and encrypted email services. This service is available for an additional fee and requires a separate installation in addition to the Outlook PlugIn.

- If checked, email receipts for messages sent using RPost will be automatically added to the Receipts folder in Outlook
    - The (R)eceipts folder will be set up automatically when installing the RPost integration

    - The client Address Book in Partner XE must include the email address with 'Allow Auto-Add' box checked



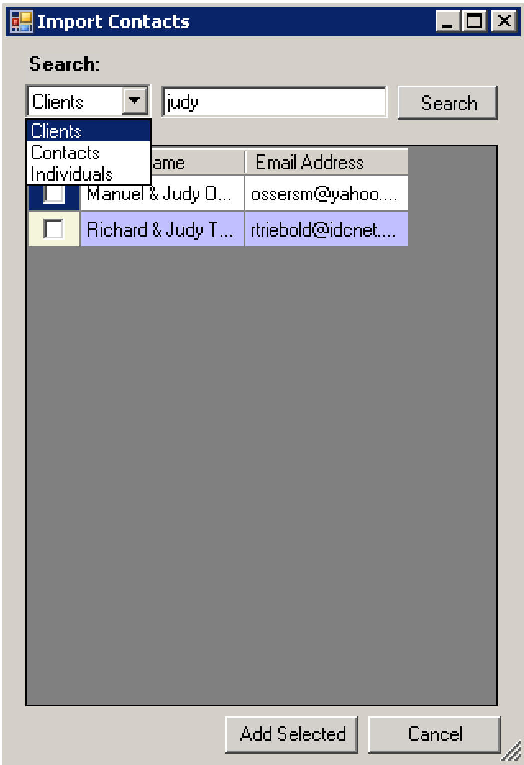
Show Client Details in Email



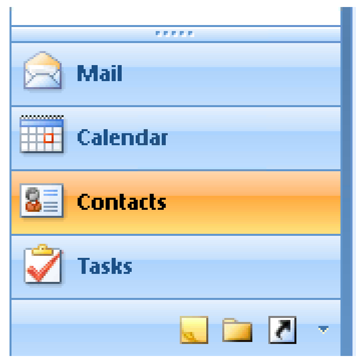
- If the **Show Client Details in Emails** options are chosen, you can show the client details in the reading pane and/or inside the email within Outlook.
- Double click on the policy number to open up the Client summary page in Partner XE.
- Select policies by **Active Only** or **All Policies**.
- Click on **Attach Email…** to bring up the search box. The Client will already be shown in the box.

To import contacts into Outlook

A client, contact or individual in Partner XE can be added as a contact into Outlook.

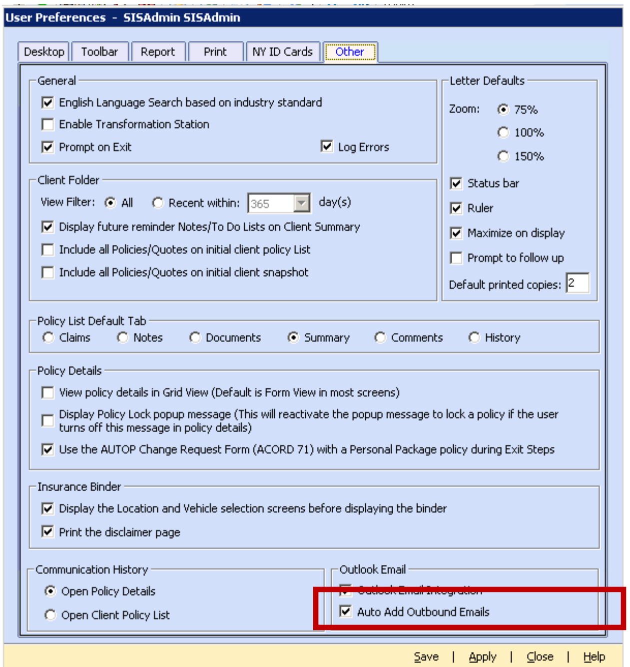


1. On the Partner XE dropdown, click on **Import Contacts**.
2. To search, select Clients, Contacts or Individuals in the dropdown menu. Click **Search**.
3. Select the correct name in the results by highlighting.
4. Click **Add Selected**.
5. This client, contact or individual will now appear in your Contacts in Outlook.



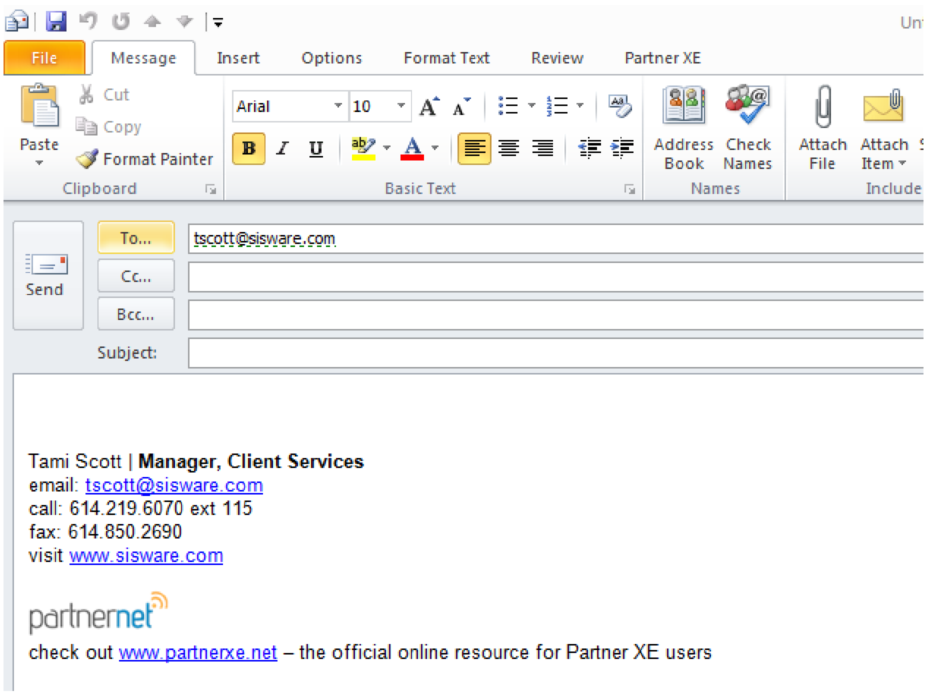
To send an Email from Partner XE and attach to documents

1. To activate this function, check Auto Add Outbound Emails in User Preferences > Other.

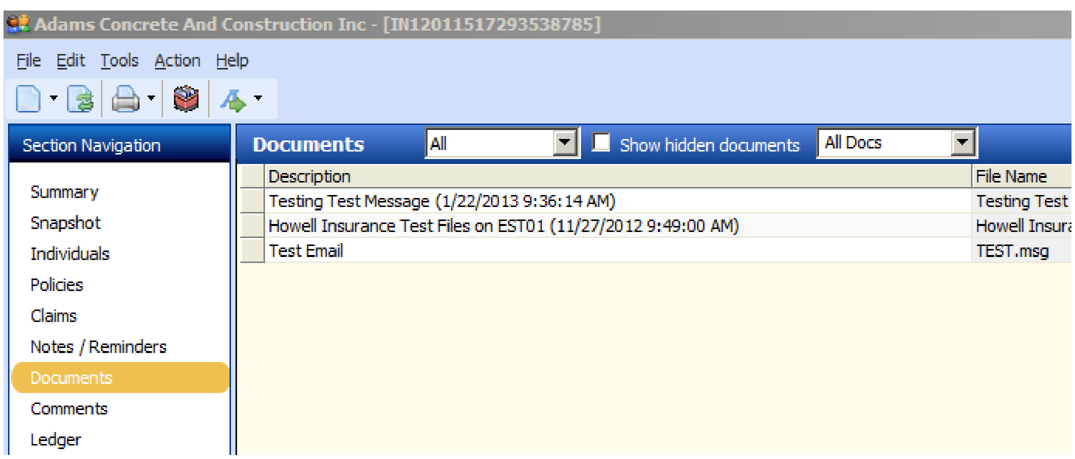


2. To send an email from Partner XE, click on any E-Mail hyperlink.

3. A message will be generated in MS Outlook. Enter your message text and send.
   - To attach a document or add a recipient from Partner XE, see **To attach a document from Partner XE into an Outlook Message** and **To add a recipient from Partner XE into an Outlook Message.**

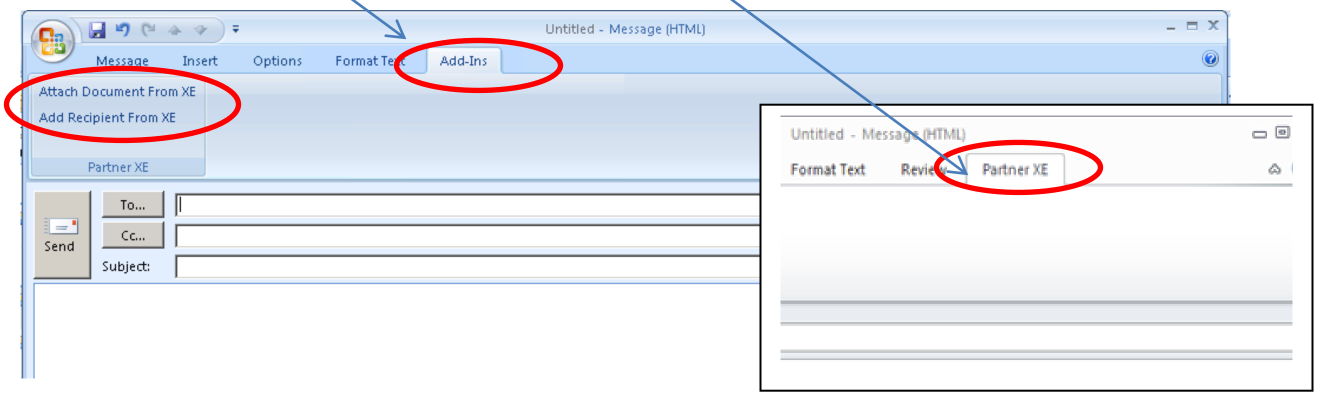


4. The message will now appear as a document in Partner XE.

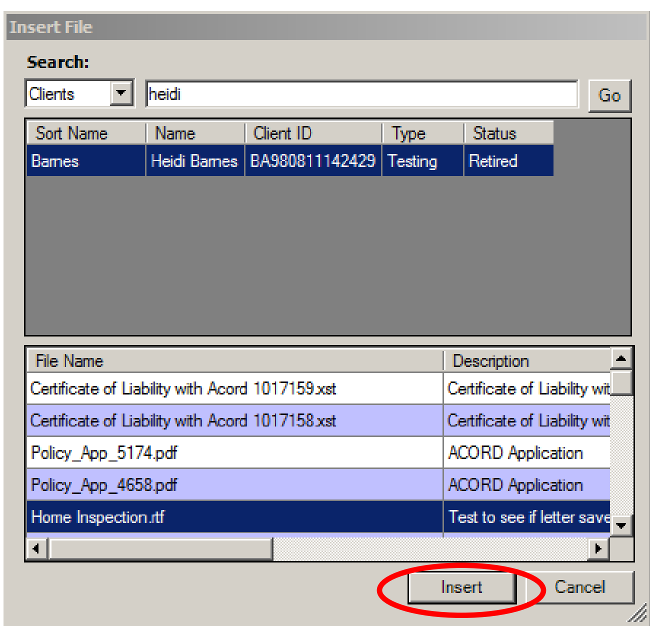


To attach a document from Partner XE into an Outlook Message

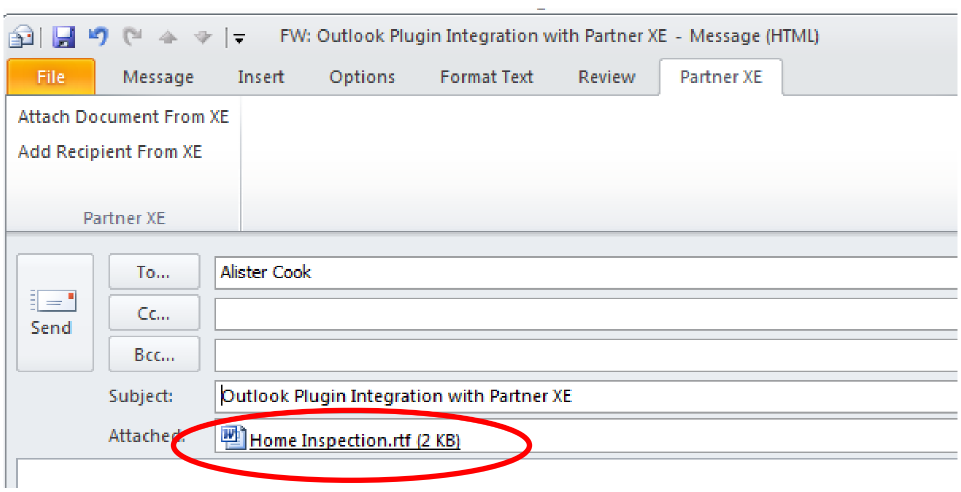
1. Open up a new email message or forward / reply to an existing email message.
2. Click on **Add-Ins** (Outlook 2007) **or Partner XE** (Outlook 2010) tab.
3. Click on **Attach a document from XE**.



4. Search for Client, Contact or Individual. (NOTE: A client can be searched for by name or by Client ID.) Select file below. Click **Insert**.

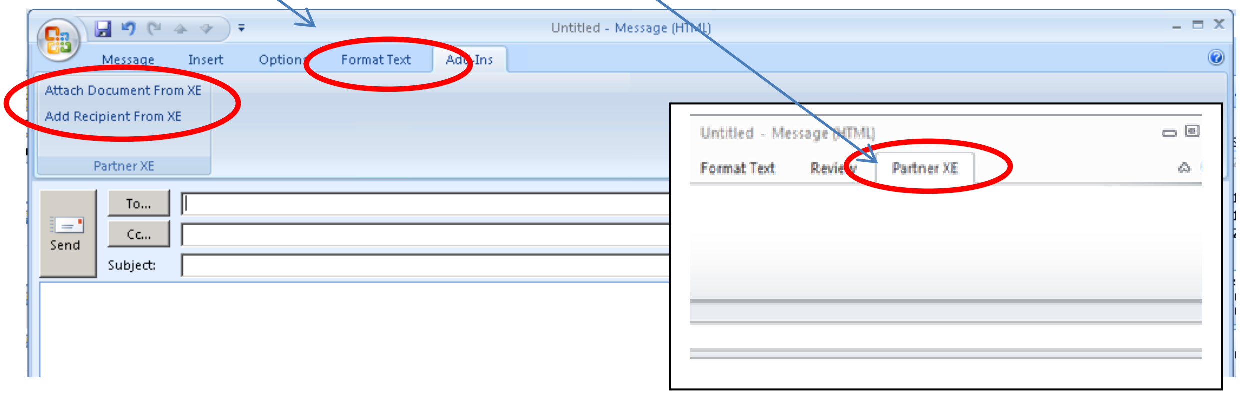


5. The document will attach to the email.

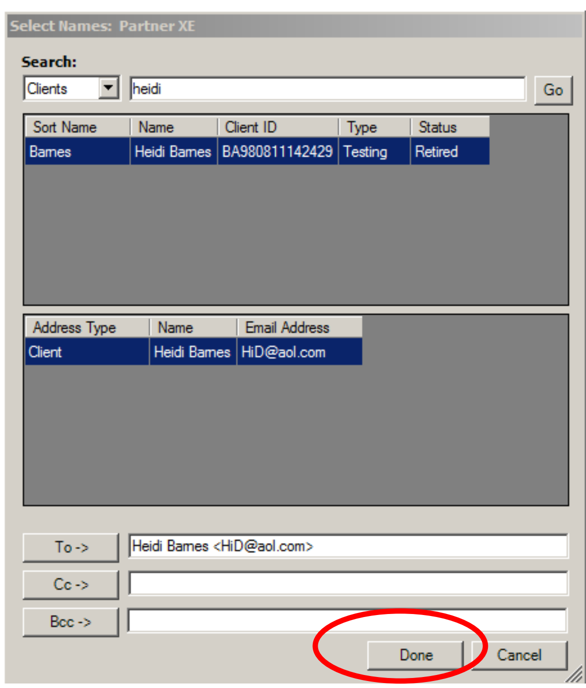


To add a recipient from Partner XE into an Outlook Message

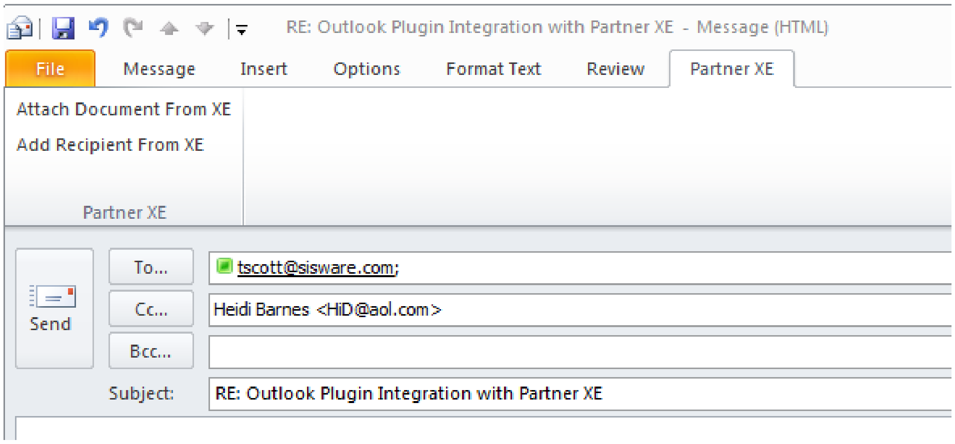
1. Open up a new email message or forward / reply to an existing email message.
2. Click on **Add-Ins** (Outlook 2007) **or Partner XE** (Outlook 2010) tab.
3. Click on **Add Recipient From XE**.



4. Search for Client, Contact, or Individual. (NOTE: A client can be searched for by name or by Client ID.) Click on the appropriate client, contact, individual from the search results. Click on To, Cc or Bcc to insert the address into the appropriate box.

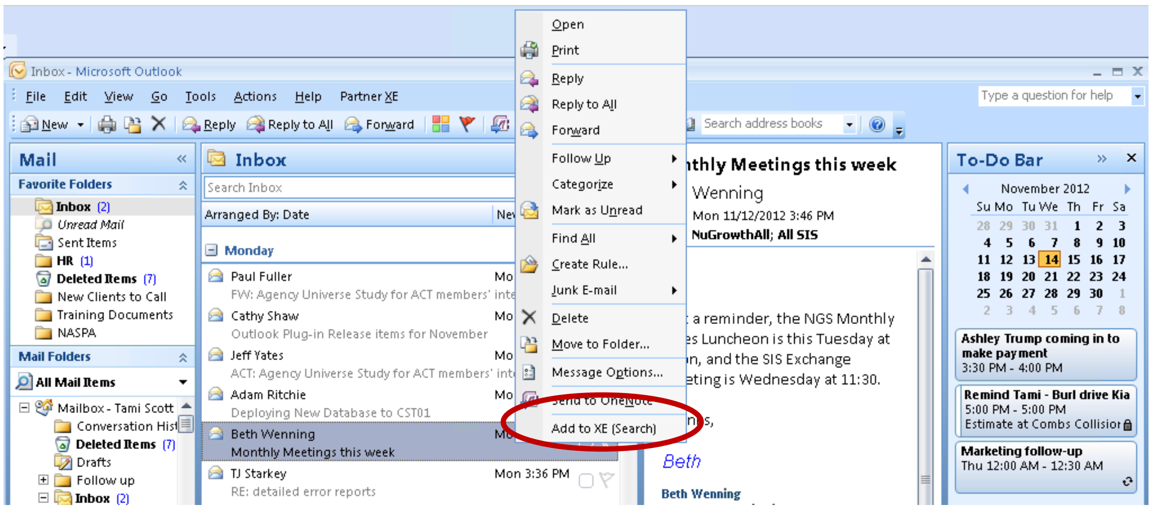


5. Click on Done. The client, contact, or individual will appear in the To, CC or Bcc address box of the email message.

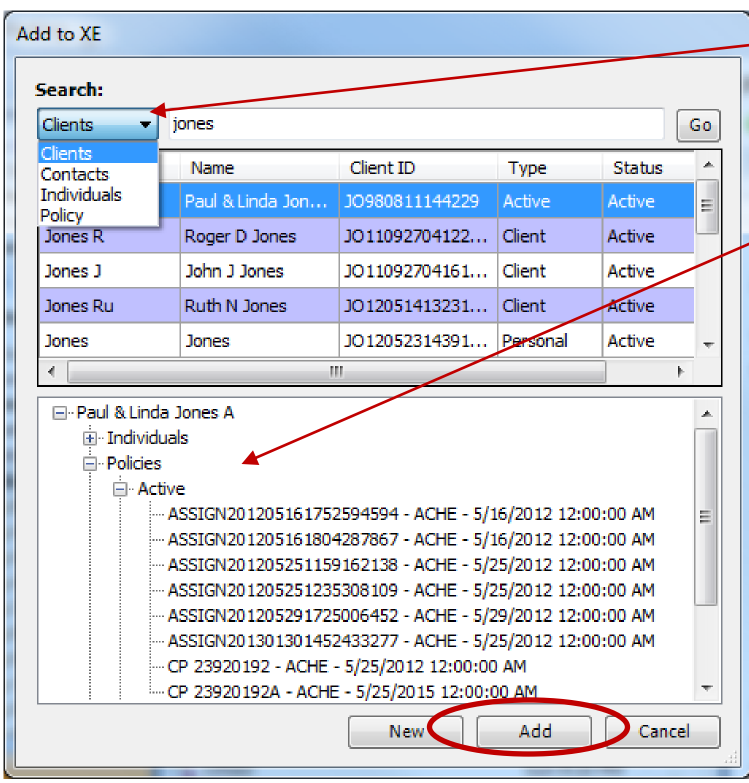


To manually add an email into Partner XE from Outlook

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



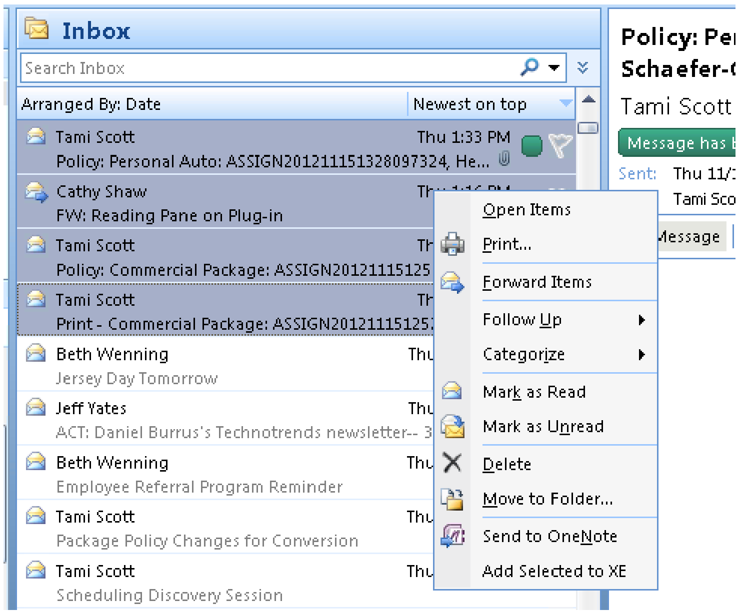
Select the location to attach the message in Partner XE. An email message can be attached to a client, contact, individual, policy, claim or document group.



1. To search, select Clients, Contacts Individuals or Policies in the dropdown menu. Enter search information. (NOTE: A client can be searched for by name or by Client ID.) Click **Go**.
2. Select the correct name in the results by highlighting.
3. A hierarchy chart will appear below with the client, individuals, policies and claims.
   NOTE: Search is based on how user preferences have been setup. I.E. show active clients only or all policies including inactive.
4. To indicate the client, individual, policy, claim or document type to attach to, click on it in the hierarchy chart.
5. Click Add.
6. A Document Description box appears with the message subject. This can be modified if needed. Click on OK.
7. This message will now appear as a document in Partner XE.

To add multiple emails into Partner XE

1. Select emails to be moved by clicking on them. Note: To select multiple emails, hold down the Ctrl key on your keyboard.
2. Right click on the highlighted messages. Click on **Add Selected to XE**.

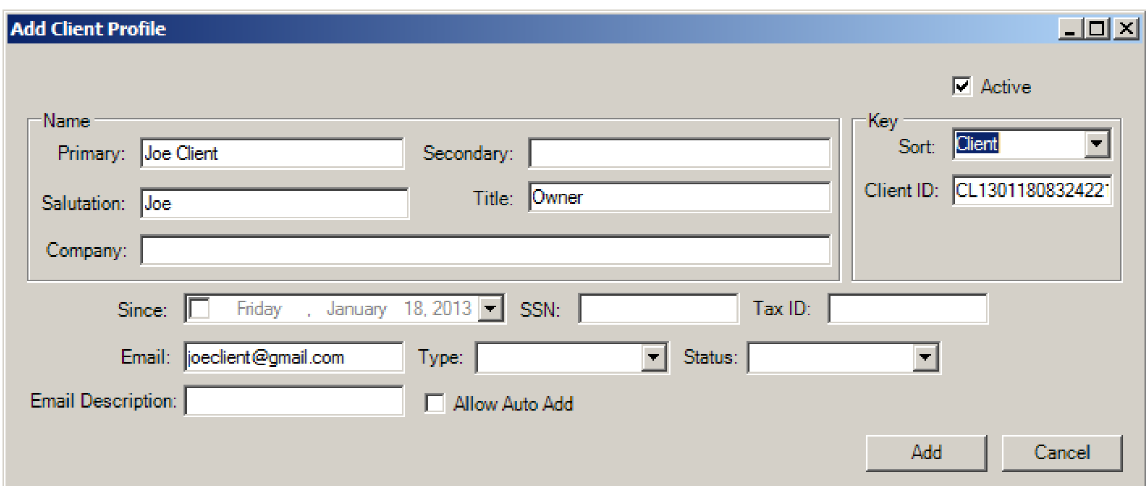


3. Specify Document Description for each email message OR check **Don't ask again. Always use the email's subject as the description.** Click OK.
4. NOTE: Email messages will be automatically attached to the client with that email address in the Partner XE client address book.

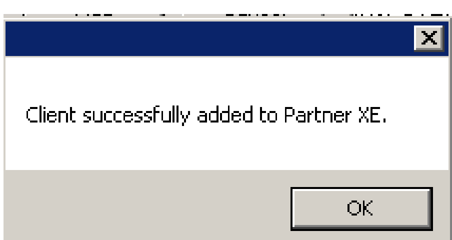
To add a new Client, Contact or Individual from Outlook

1. A new Client, Contact, or Individual can also be added to Partner XE from Outlook. Right+click on the email and select **Add to XE (Search)**. At the bottom of the **Add to XE** box, click on **New.**
2. An option will be given to select the profile type.

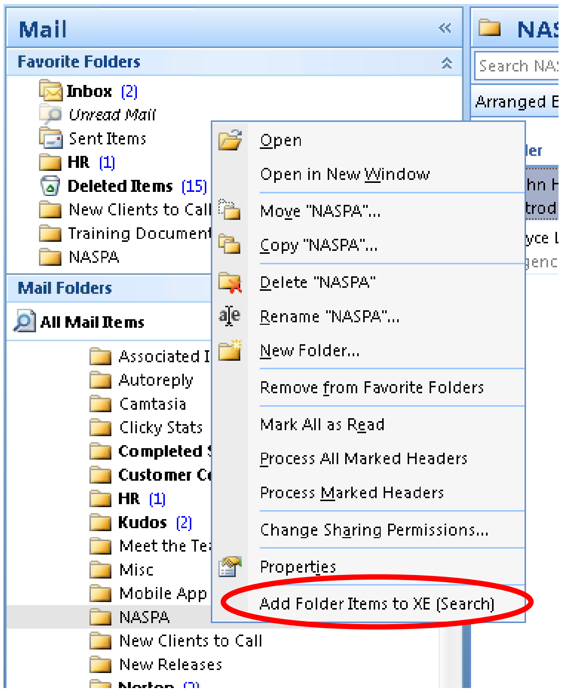
3. Click on **Create**.
4. An **Add [Client/Contact/Individual] Profile** screen will appear. Enter information and click on **Add**.

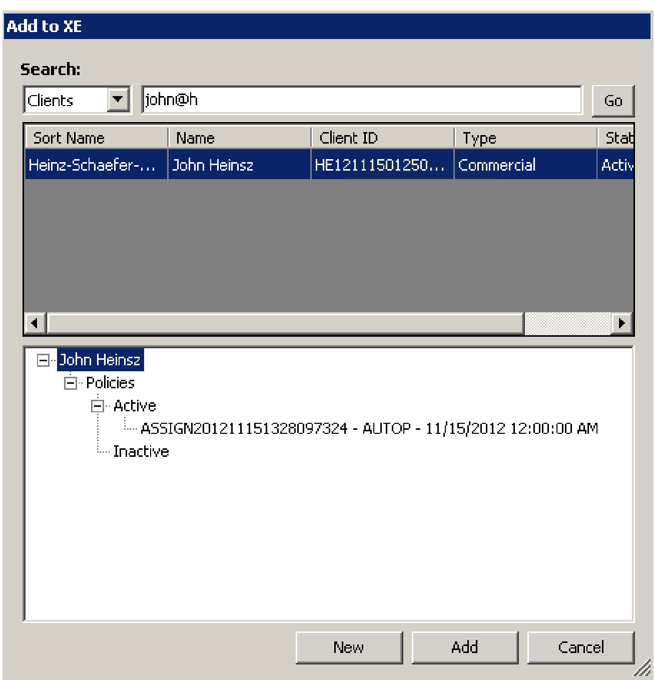


5. A message will appear. The new Client, Contact or Individual is now in Partner XE.



To add an Outlook folder into Partner XE





1. Right click the Outlook folder.
2. Select **Add Folder Items to XE (Search)**
3. Search for client, contact or individual. (NOTE: A client can be searched for by name or by Client ID.)
4. A hierarchy chart will appear below with the individuals, policies and claims. *NOTE: Search is based on how user preferences have been setup. I.E. show active clients only or all policies including inactive.*
5. To indicate the client, individual, policy, claim or document type to attach to, click on it in the hierarchy chart.
6. Click **Add**.
7. A Document Description box appears with the message subject. This can be modified if needed. Click on OK.
8. This folder will now appear as a document in Partner XE.

To monitor Inbox and Sent Items

For users with multiple inboxes or sent items folders in Outlook, the Outlook Plug-In gives the option of selecting one to monitor for automatically attaching emails.

1. Right click on the Inbox or Sent folder.
2. Select **Monitor this Folder** from the menu dropdown.