Microsoft Outlook Plugin – A User Guide

Welcome to the accessplanit Microsoft Outlook plugin guide, the following information will talk you through the setup of the tool, the various functions that the tool has in a simple to follow visual guide.

The purpose of the Microsoft Outlook Plugin is to capture information from emails that are sent and/or received from people that have a corresponding record that exists within your accessplan system, this information is then stored under 'user communications' and 'company communications'.
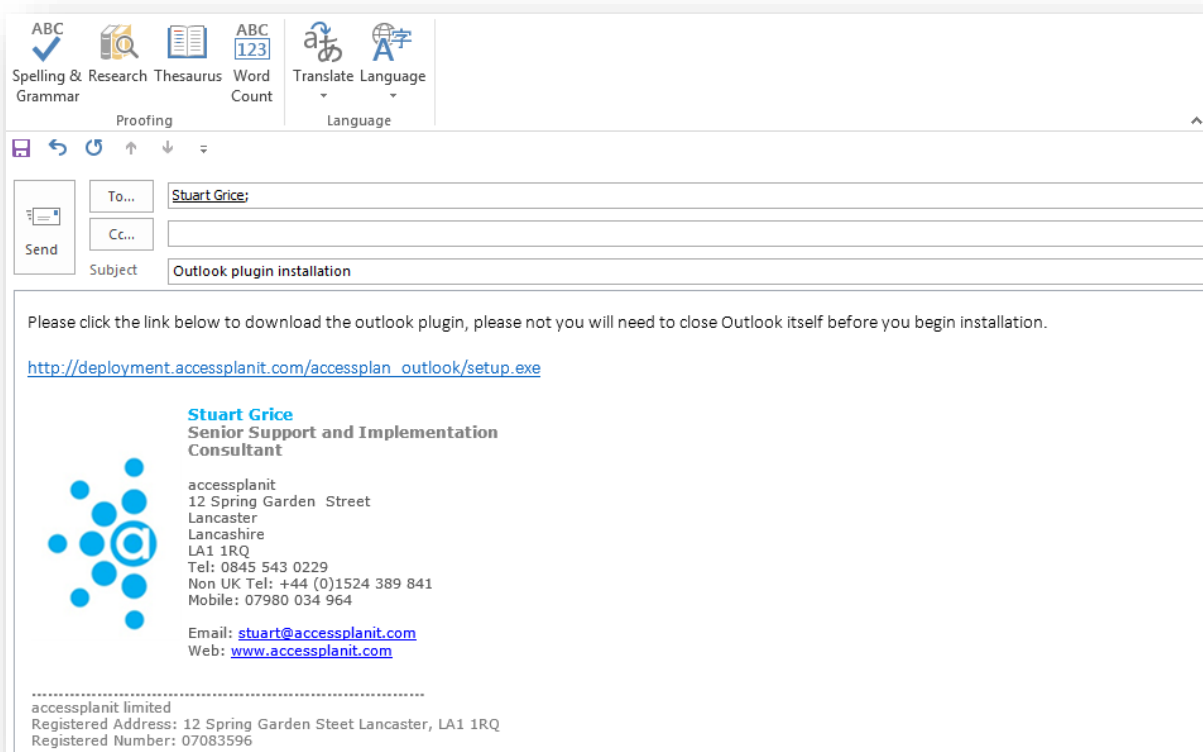
This means that providing the tool is installed on your computer, when a user or company is searched within your accessplan system selecting the 'view communications' option will show any emails sent or received to or from the selected user or company, this gives everyone who has access to your accessplan system a full communication trail between the customer and your own team.

Please Note: the plugin is not Mac compatible and you will need to be running Outlook version 2010 or later to use the plugin.

Section 1 – Download and installation.

The plugin is downloaded via a simple link that will be sent to you via email via the sales or support team, to install the plugin you will need to click the supplied link and follow the on screen instructions.

To install the plugin you will need to make sure that your version of Outlook is closed during the actual installation process.

Office Address: 12 Spring Garden Street, Lancaster, Lancashire, LA1 1RQ Tel (UK): 0845 543 0229
Tel (Non UK): +44 (0)1524 389841 Email: enquiries@accessplanit.com
accessplanit Ltd Registered Address: 12 Spring Garden Street, Lancaster, Lancashire, LA1 1RQ, UK Registration Number: 07083596

www.accessplanit.com
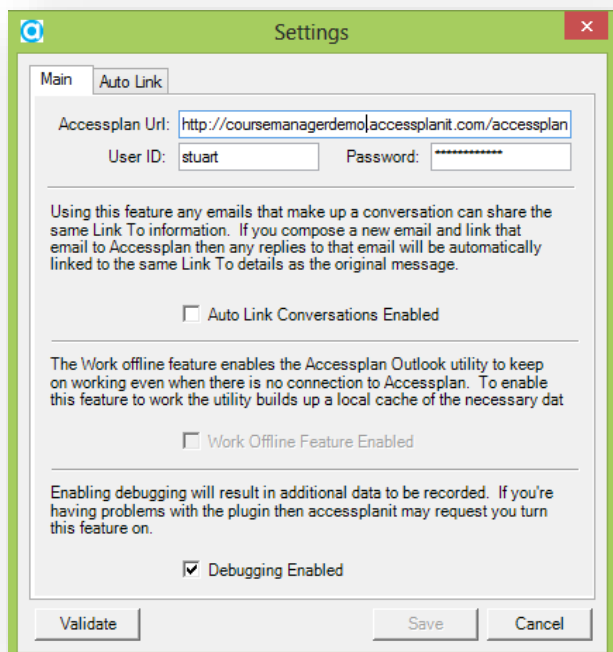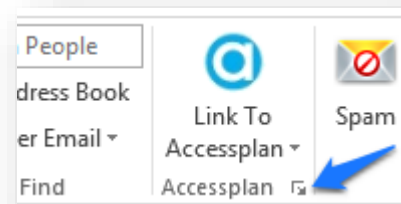
Section 2 – Setup

Once you have downloaded and installed the plugin simply open Outlook as usual, the plugin itself will check for any updates in the background but your email will open as usual, if there are any updates to the plugin you will be prompted to update it.

The first thing you will need to do with the plug in is to log into accessplan via the tool itself, this is a onetime set up procedure but it is vital for the tool to actually do its job.

To set up the tool click the small square icon to the very bottom right of the word name 'Accessplan' it looks like a square with an arrow pointing down and to the right as pointed out here.

Clicking this button will open up the main settings panel that has all the options you need to get the tool up and running so that it actively logs emails within the communication sections within your accessplan system.

There are two tabs at the top of the settings, the 'Main' tab is where you enter your system URL, you only need to enter the first word then click or tab out of the text box, for example entering 'coursemanagerdemo' is the only typing required for the course manager demo system that is used here.
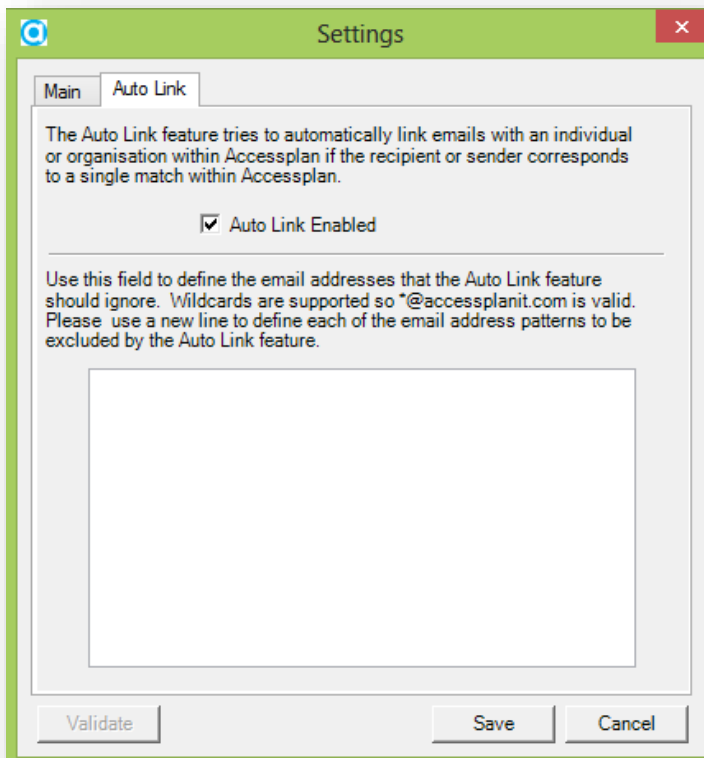
The next section is asking for your accessplan user ID and password, once this is entered the 'validate' button at the bottom left needs to be clicked to check your url, username and password, if the validation is successful the option to save the details (at the bottom right) then becomes available, click save to save your progress.

The other options on the main tab are 'Auto Link Conversations Enabled', 'Work Offline Feature Enabled' and 'Debugging Enabled' the auto link option means that the system will link any emails together that have the same subject or that are all replies to the same original email (conversation linking) the 'work offline' feature is not yet available.

The final option 'Debugging Enabled' will record additional data and send update emails through to accessplanit daily, this mode is used if you are having any issues or difficulties with the tool.

The second tab, named 'Auto Link' has two purposes.

The first option is a simple tick box called 'Auto Link Enabled' if this option is selected the plugin will automatically find your contacts within your accessplan system when emails are sent and received without you having to do anything manually to enable linked communications, in order for this to work the email address(s) must exist within your accessplan system already.

The second option is used in conjunction with the first option and is a large free text box, this text box is used to 'ignore' any email domains that are entered into it, for example '@accessplanit.com' this is simply because you are highly likely to have your own company email in your system along with all your colleagues, the auto link feature would capture your emails to each other and save them in the communication section of the system, this would mean that each time anyone in the office emailed each other, accessplan would capture a long string of emails under both the sender and the recipient's communications.

Any updates to the setting would need to be saved by clicking the save button at the bottom right, if the save button is greyed out then the validate button will need to be clicked first.

Once these options have been saved the tool is ready to use, remember the tool will not do anything on its own if auto link isn't enabled, also, the email address(s) of the users/candidates must already exist within your accessplan database in order for auto link or to manually link a user.
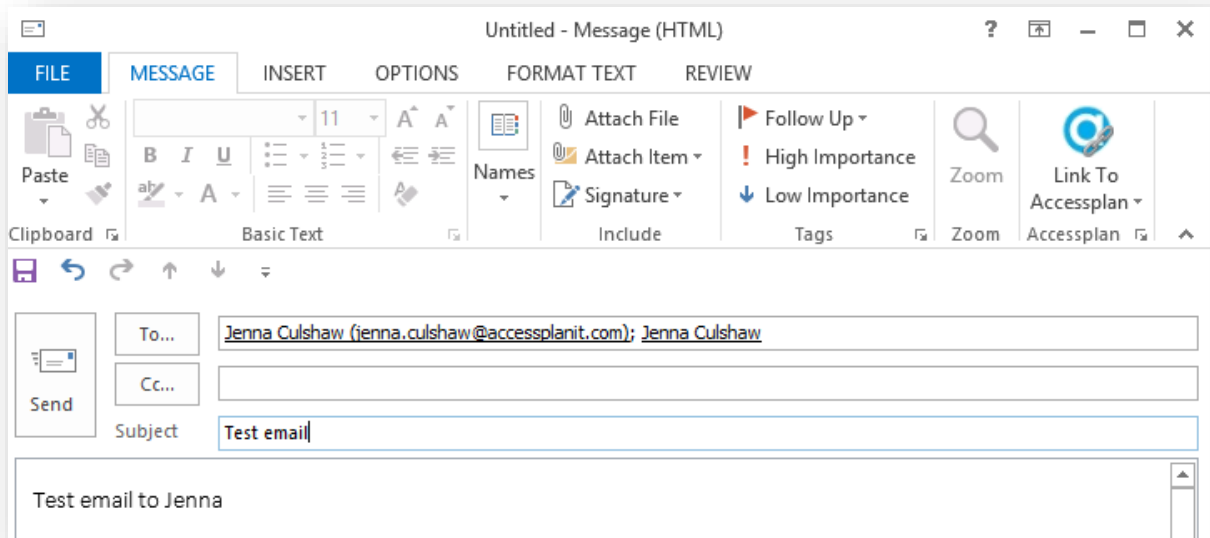
Section 3 – linking emails

There are two ways to link to email addresses, the auto link that is set up in section 2, or if the auto link option is left de-selected manually linking emails.

This section covers how both modes work.

Auto linking.
To auto link an email you simply send or receive an email from anyone who has an existing email address within your accessplan database, this method is the quickest and easiest way of using the tool.

In the example above I have started to compose an email to Jenna, the plugin automatically searches the system that I am logged in to, in this case 'http://coursemanagerdemo.accessplanit.com' it sees that Jenna's email address exists and puts a small chain icon in the bottom right hand corner of the accessplan logo to show that this users email has been linked to accessplan.

Now when I send the email the content of the email will be logged under Jenna's name in the user communication section of the course manager demo accessplan system.

This is accessed by opening the system, logging in then performing a user search on Jenna.

Once the name is returned in the search a right mouse click brings up a contextual menu with a series of options, selecting 'User Communications' will open the communications section.

The communications section will contain any system emails or elements that have been sent to the user and now also any email that has been sent to or from the user by anyone running the outlook plugin.
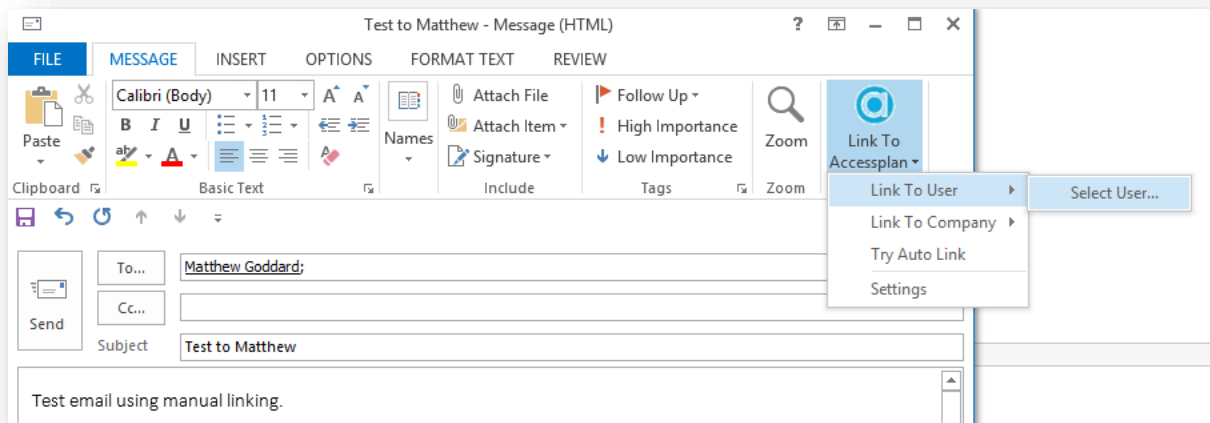

In this example you can see that the last communication was the example sent from outlook, the first column says 'Outlook' and all the information from the email is contained within the row, right clicking this row gives you the option to view, edit or delete the communication.

Manual linking

The manual link gives you more control over what emails are stored on accessplan, the process takes slightly longer but gives you the choice per email to store it on accessplan or not.
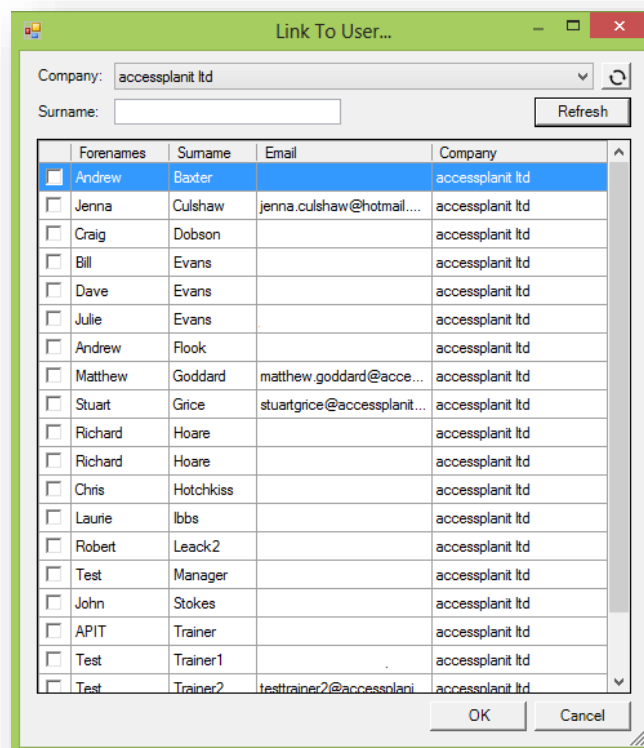
For manual linking to work you must make sure that the auto link tick box is de-selected from the settings page (see section 2)

In this example I have composed an email to Matthew, the auto link chain image hasn't' appeared because I am in manual mode, I have decided to link this email to accessplan manually.

This time, because this is a manual link I have to click the accessplan logo, select link to user, then click select user, this will present you with a drop down list of all the companies on your system which will then show a list of all users and their email addresses listed below, the task is then to manually select who this email will be stored against in the communications section.
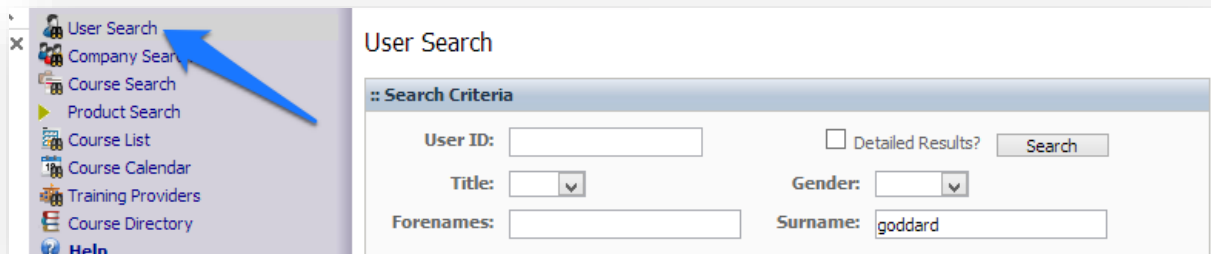
If you select a different person to the name you have entered into your email the system will not correct so be careful when selecting the user.
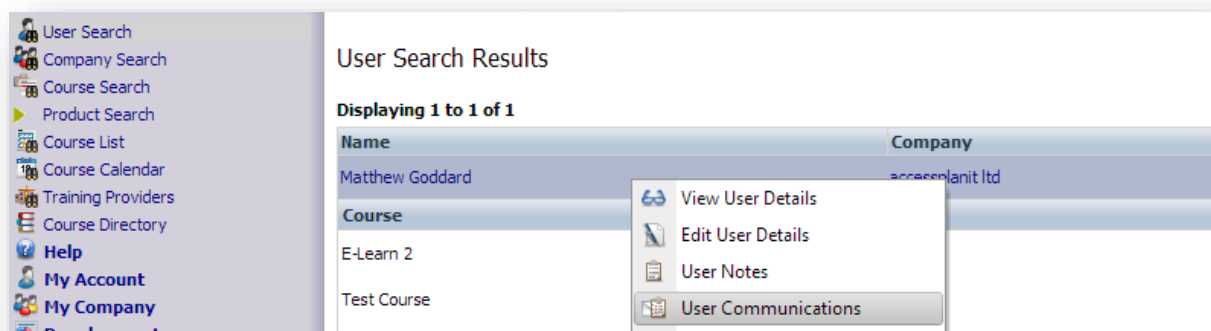
Section 4 - Viewing Communications

This section has been touched on in section 3 but here follows a recap.

To view any communication linked to a user or company simply perform a user search or company search for the user or company that you are looking for.

Then use the right click on the users name and select 'User Communications' or 'Company Communications' the difference is that the company communications will display any emails that have been sent to users within the company, the user communications will only show communications with the currently selected user.

Below is the view of all company communications with accessplanit. The top section actually allows you to enter manual communications but this does not interact with outlook at all.