

info@hand Plug-in for Microsoft Outlook

User Guide



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1.0 Welcome

Thank you for using the **info@hand** Plug-in for Microsoft Outlook from The Long Reach Corporation. This plug-in is intended to help manage and maintain the exchange of information between the **info@hand** Business Portal, and Microsoft Outlook 2003/2007.

1.1 About this Guide

This guide is current with the details of operation for version 1.4 of the **info@hand** Plug-in for Microsoft Outlook.

Readers are required to be familiar with the use of a personal computer, and Internet browser software such as Microsoft Internet Explorer or Mozilla Firefox, as well as having a basic familiarity with the Windows XP/Vista Operating System and Microsoft Outlook 2003/2007.

1.2 Who Should Read this Guide?

This **info@hand Plug-in for Microsoft Outlook User Guide** is intended for any user of **info@hand** that wishes to synchronize their data with Microsoft Outlook 2003 or 2007. Please note that Outlook Express and Outlook 2000 are not supported.

2.0 Plug-in Overview

The **info@hand** Plug-in for Microsoft Outlook utilizes the **info@hand** SOAP web services interface to integrate **info@hand** with Outlook. The **info@hand** Plug-in for Microsoft Outlook offers the following capabilities:

- Open up **info@hand** in a browser session
- Sync Contacts between **info@hand** and Outlook
- Sync Calendar items between **info@hand** and Outlook
- Send Outlook emails (and if configured to do so, their attachments as well) to **info@hand**, and link the emails to multiple Contacts and optionally one Account, Lead, Opportunity, or Case
- Search **info@hand** for a specific Contact, Lead, Case, Opportunity or Account
- Create a new Account, Contact, Lead, Opportunity, or Case within **info@hand**
- Optional Auto-synchronization of marked Contacts and Appointments

The **info@hand** Plug-in for Microsoft Outlook was designed for Microsoft Outlook 2003, and Outlook 2007 only. It is not intended to work with Outlook Express or Outlook 2000. Microsoft Outlook and Outlook Express, while the names are similar, are two very different applications.

2.1 Plug-in Availability

You can get access to the **info@hand** Plug-in for Microsoft Outlook by contacting sales@infoathand.com.

3.0 Plug-in Installation

Installing the **info@hand** Plug-in for Microsoft Outlook is quick and easy. It may be installed on Windows XP, or on Windows Vista, for use with Microsoft Outlook 2003 or 2007.

If you are installing on Windows Vista - please note that the plug-in will install fine on Vista, but you must run Outlook 2007 at least once explicitly as an Administrator. To do so, you must right click on the Outlook 2007 icon and select Run as Administrator. Simply being an administrator when you run the plug-in installer is not enough.

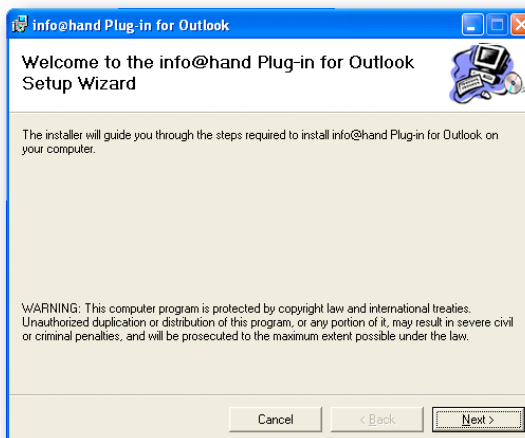
To install the plug-in, first make sure that you have uninstalled any previous versions of the plug-in using Control Panel, Add/Remove Programs. Note that other Outlook plug-ins may also interfere with the operation of the **info@hand** Plug-in for Microsoft Outlook, so if you have difficulties with your installation, remove any other plug-ins you may have installed.

Next, make sure that the version of **info@hand** installed on your server is at least 5.1.0, and make sure you know the URL (web address) of the **info@hand** installation, as you will need it for the plug-in installation process.

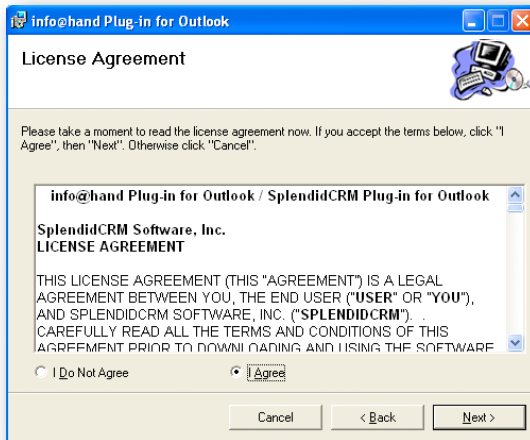
Now, simply double click on the .exe file (typically 37 MB or so in size) when you have it downloaded on your desktop. You will see this dialog box:



Once this extraction process completes, you will see the following dialog box:

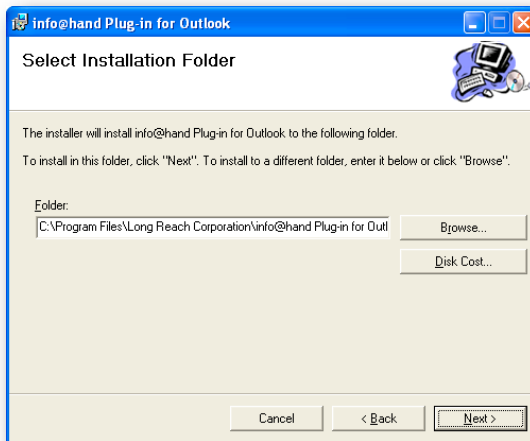


Click on Next to proceed to accepting the License Agreement:

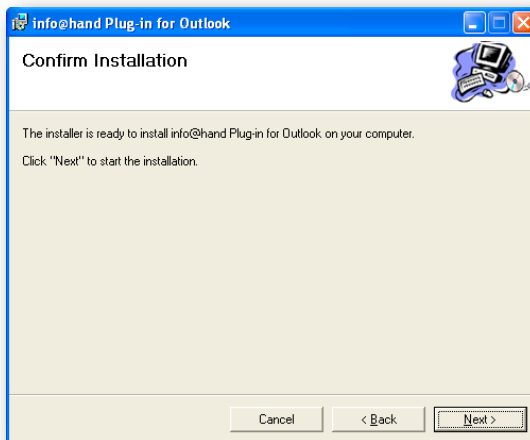


Read the License Agreement, and if you accept the terms, click on I Agree, and then on Next to proceed with the installation. Otherwise click on Cancel.

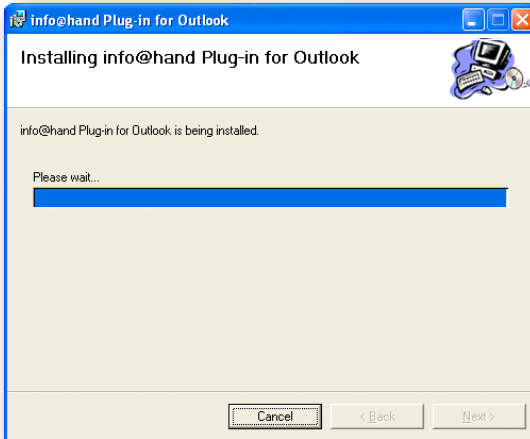
Now select the folder in which you wish to install the plug-in, and then click on Next.



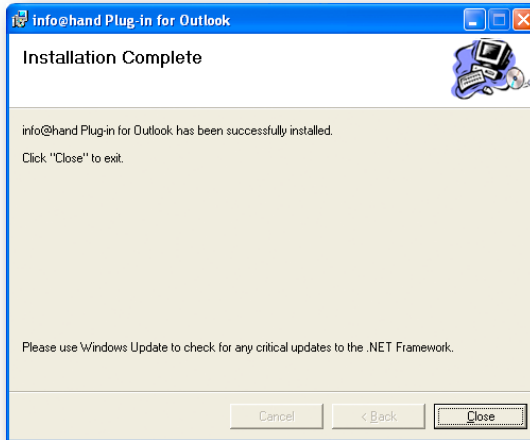
Now just click on Next to confirm the installation...



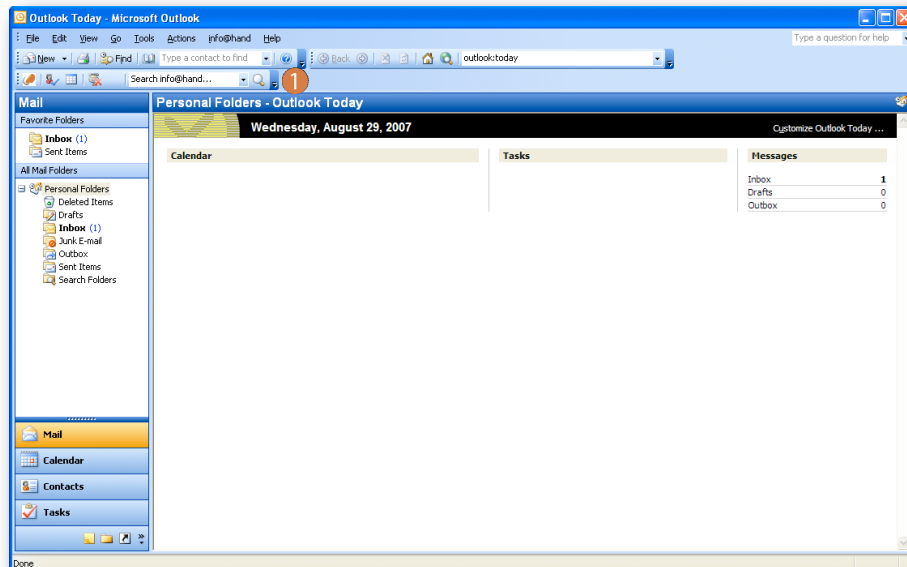
And the installation runs ...



and then completes.

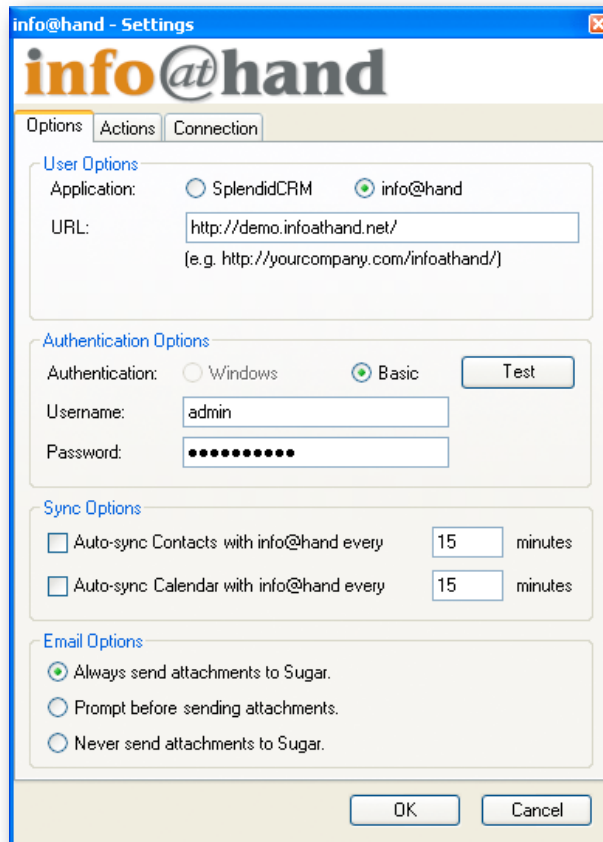


If you now run Outlook, you should see the new **info@hand** toolbar (marked as item 1):



4.0 Plug-in Configuration

Once the application is successfully installed, you will need to review and modify the values found in the Configuration dialog box. From the Microsoft Outlook **info@hand** menu select **info@hand** -> **info@hand** Settings. This dialog box will be displayed:



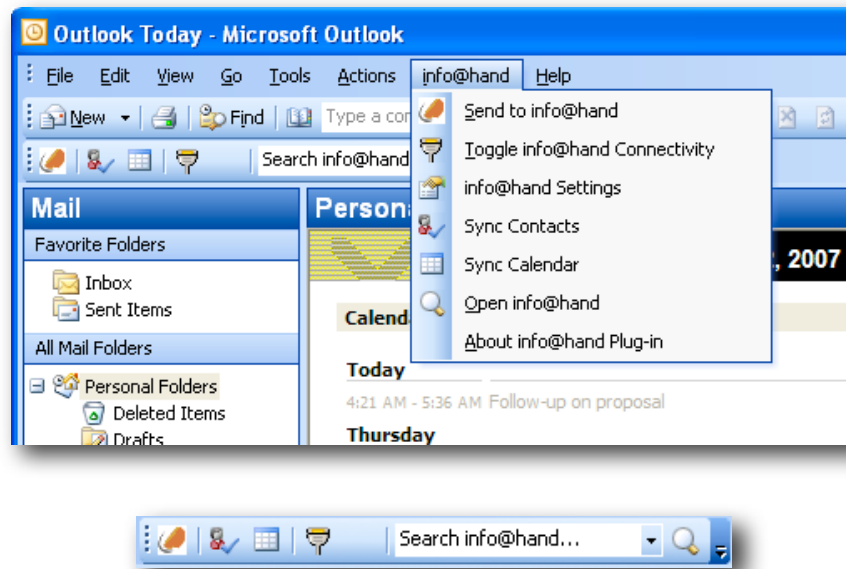
Choose the radio button for **info@hand**, as shown above. Then enter the URL for your **info@hand** installation. Next, enter your **info@hand** username and password, so that data from your Outlook client may be correctly added to **info@hand** and attributed to you. You can use the Test button to check that the URL and username/password information is allowing the plug-in to access the **info@hand** server via SOAP-based web services.

Next, choose the auto-sync and email attachments settings you prefer.

Then just click on OK to save these settings for future use. Your **info@hand** plug-in for Microsoft Outlook is now fully configured for use.

5.0 Using the Plug-In

You use the **info@hand** Plug-in for Microsoft Outlook by one of two methods - either the Outlook menu system, or the **info@hand** menu bar:



There are six main functions of the **info@hand** Plug-in for Microsoft Outlook, and you can perform most of them using either the Outlook menu system, or the **info@hand** menu bar:

- Toggle **info@hand** Connectivity
- Open **info@hand**
- Sync Contacts
- Sync Calendar
- Send to **info@hand**
- Search **info@hand**

5.1 Toggle **info@hand** Connectivity

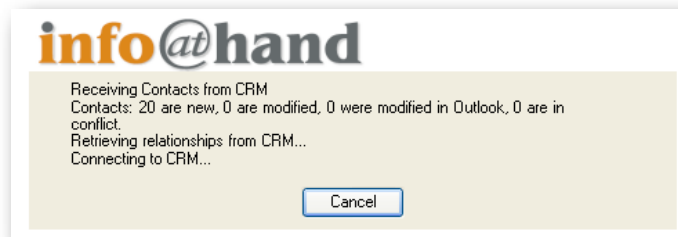
When Outlook is first opened, the connection to **info@hand** is made active by default. If for some reason you would like to suspend that connection, you may do so by clicking on the connector icon on the **info@hand** menu bar, or using the menu option for Toggle **info@hand** Connectivity. The connector icon will show a large red X on it to indicate the connection is not active. If you close Outlook with the link inactive, it will remain inactive when you next run Outlook, until you toggle the connection active once again.

5.2 Open info@hand

If you have Outlook open on your PC most of the time, a quick way to open **info@hand** in your web browser is to click on the magnifying glass icon on the **info@hand** menu bar, or using the menu option for Open **info@hand**.

5.3 Sync Contacts

The plug-in enables you to sync contacts between Outlook and **info@hand**. Just click on the contact icon, or select the menu option, and you will see a status display superimposed on the Outlook application, much like the one shown here:



Note that no contacts will be sync'ed from **info@hand** to your Outlook unless they meet these two criteria:

1. The Contacts must belong to you.
2. The Contacts must have the Sync to Outlook flag set for them - which by default is not set.

5.4 Sync Calendar

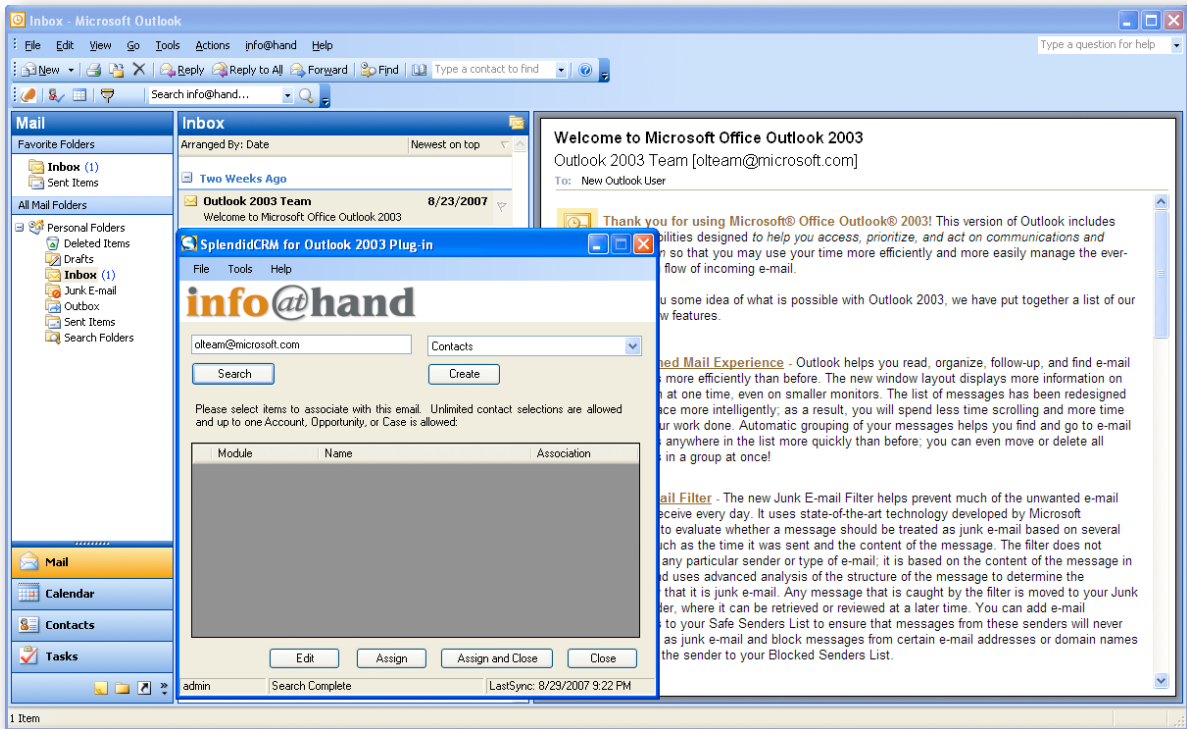
The plug-in enables you to sync calendar items (Calls and Meetings in **info@hand**) between Outlook and **info@hand**. Just click on the calendar icon, or select the menu option, and you will see a status display superimposed on the Outlook application, much like the one shown here:



Note that no Meetings or Calls will be synchronized from **info@hand** to your Outlook unless they belong to you, or you are a scheduled attendee.

5.5 Send to info@hand

One of the principle tasks handled by the **info@hand** plug-in for Microsoft Outlook is to move email items from Microsoft Outlook into **info@hand**. This can be done from the Send to **info@hand** Outlook menu item, or using the Long Reach logo icon in the **info@hand** toolbar.



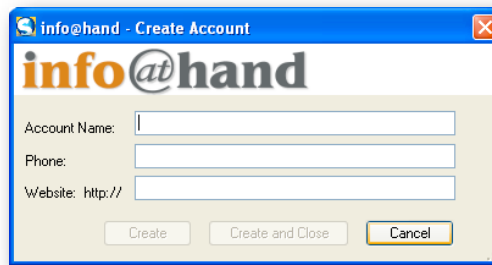
First, highlight one or more emails in a mail folder in Outlook. Then, when you click on the Long Reach logo icon, or use the menu option, you will see the dialog box above pop up over Outlook.

You can use the controls provided to tell **info@hand** to link the email(s) with one or more Contacts within the CRM, and optionally with one Account, Lead, Opportunity or Case.

You can also use the Create button to create a new Account, Case, Contact, Lead or Opportunity in **info@hand**, in which case the plug-in will display a dialog box such as:



or ...



5.6 Search info@hand

The **info@hand** plug-in for Microsoft Outlook can also search for items within the **info@hand** system. Use the **info@hand** toolbar search text box to perform this function. You will see the dialog box below:



Note that once again, you have the option to create a new Account, Case, Contact, Lead or Opportunity in **info@hand**, and that the Search function can also be used to associate data with an email.

This search function is essentially identical to the Send function, except that it allows you to specify text before the dialog box is displayed.



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