ConSol CM/Outlook-Add-in

User manual for the ConSol CM/Outlook Add-in

Status of the document: Published

Version of the document: 1.4

Contents

1 Introduction

The ConSol CM/Outlook add-in allows you to transfer emails, contacts and attachments from Microsoft Outlook to ConSol CM. With one click you can for example create a new contact in ConSol CM, transfer an email to the history of an existing case or create a new case from an email.

By using the Outlook add-in, you can increase team efficiency, save time and improve internal communication within the team. Thanks to the simple data transfer from Microsoft Outlook to ConSol CM, data no longer needs to be copied manually. This makes it easy to share all important data with all team members, improving the consistency of the data stored in ConSol CM, as all relevant data is maintained in ConSol CM.

2 System requirements and installation

The ConSol CM/Outlook add-in is available for ConSol CM versions 6.11.1 and higher. It supported for the desktop application of Microsoft Outlook 2016 and higher.

> The Microsoft Outlook web application is not supported.
>
> The ConSol CM/Outlook add-in is not included in the standard scope of delivery of ConSol CM and must be licensed separately.

2.1 Installation and configuration

The ConSol CM/Outlook add-in is installed and configured as follows:

1. Contact ConSol CM support or your ConSol CM consultant to obtain the installation files for the ConSol CM/Outlook add-in.

2. Close Microsoft Outlook.

3. Execute the installation file and follow the instructions of the installation wizard.

4. Start Microsoft Outlook. The ConSol CM/Outlook add-in should be displayed in the *Start* ribbon.

5. Click the ConSol CM icon in the add-in and enter the following information:

   • URL of the ConSol CM instance to use with the add-in

   • User name and password to log in to this instance

3 Features

The ConSol CM/Outlook add-in offers a range of functions which you can use when working in Microsoft Outlook and handling emails and contacts which belong to cases in ConSol CM.

- Opening a case: Open the case which an email refers to in ConSol CM.
- Opening a contact: Open the contact who sent an email in ConSol CM.
- Creating a contact: Create a new contact in ConSol CM.
- Creating a case: Create a new case in ConSol CM.
- Attaching an email to a case: Transfer an email to a case in ConSol CM.
- Adding attachments from an email to a case: Add attachments from an email to any case in ConSol CM.

To perform these actions via the Outlook add-in, you need the same permissions as in ConSol CM.

3.1 Opening a case

The ConSol CM/Outlook add-in allows you to open the case, which an email you are reading in Microsoft Outlook belongs to, directly in ConSol CM.

3.1.1 Situation

You are reading an email in Microsoft Outlook which belongs to a case in ConSol CM. Now you want to edit this case.

3.1.2 Prerequisites

You have ConSol CM open in your default browser and are logged in there. You have the necessary permissions in ConSol CM to view the case.

The email in Microsoft Outlook is linked to the case in ConSol CM if the subject of the email contains the case number or the case was created via the Outlook add-in.

> The email in Microsoft Outlook is linked to the case in ConSol CM if the subject of the email contains the case number or the case was created via the Outlook add-in.

3.1.3 Procedure

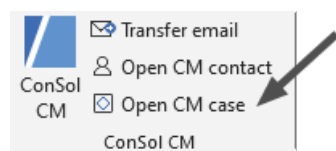Click *Open CM case* in the ConSol CM/Outlook add-in.

Figure 1: *Open case from the email view*

The case is automatically opened in your default browser. You do not need to search for the case in ConSol CM.

> If no case is found for the email in ConSol CM, the selection window for transferring the email is displayed so that you can either create a new case directly (see Creating a case) or attach the email to an existing case (see Attaching an email to a case).

3.2   Opening a contact

The ConSol CM/Outlook add-in allows you to open the contact who sent you an email directly in ConSol CM. You can also open contacts from the person view.

3.2.1   Situation

You are reading an email in Microsoft Outlook which was sent by contact saved in ConSol CM. Now you want to edit the contact there.

3.2.2   Prerequisites

You have ConSol CM open in your default browser and are logged in there. You have the necessary permissions in ConSol CM to view the contact.

> A contact in ConSol CM is linked to Microsoft Outlook if the contact has the same email address in both ConSol CM and Microsoft Outlook.

3.2.3   Procedure

Click *Open CM contact* in the ConSol CM/Outlook add-in. This option is available in the email view and in the person view.
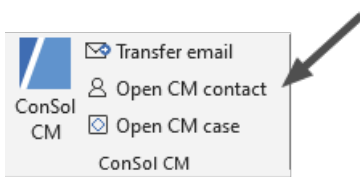

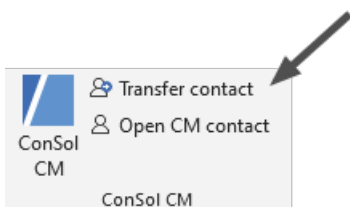Figure 2: *Open contact from the email view*

Figure 3: *Open contact from the person view*

If there are several contacts with the email address in ConSol CM, a pop-up window, where you can select the desired contact, is shown:
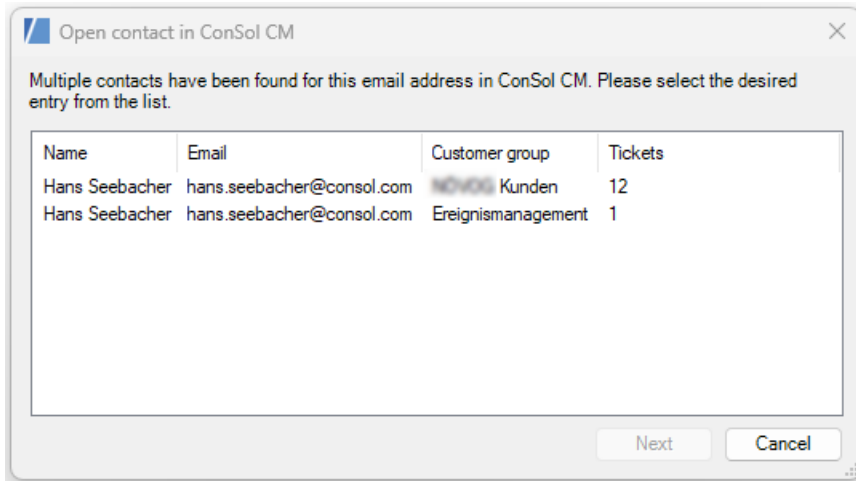

Figure 4: *Select contact to open*

The contact is automatically opened in your default browser. You do not need to search for the contact in ConSol CM.

3.3 Creating a contact

The ConSol CM/Outlook add-in allows you to create a contact in ConSol CM from the person view or an email.

3.3.1 Situation

You need a contact from Microsoft Outlook in ConSol CM.

3.3.2 Prerequisites

You have the necessary permissions to create contacts in ConSol CM.

3.3.3 Procedure

There are several ways to transfer a contact from Outlook to ConSol CM:

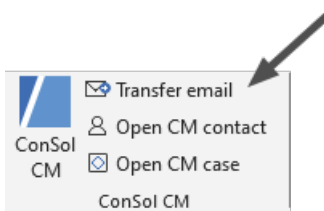- Transfer an email for which there is not yet a contact in ConSol CM (see also Creating a case).

Figure 5: *Create contact from the email view*

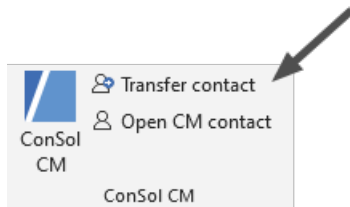- Click *Transfer contact* in the person view in Microsoft Outlook.

Figure 6: *Create contact from the person view*

- Try to open a case or a contact which does not yet exist in ConSol CM.

If you have permissions to create contacts in more than one customer group, a pop-up window, where you can select the desired customer group, is shown:
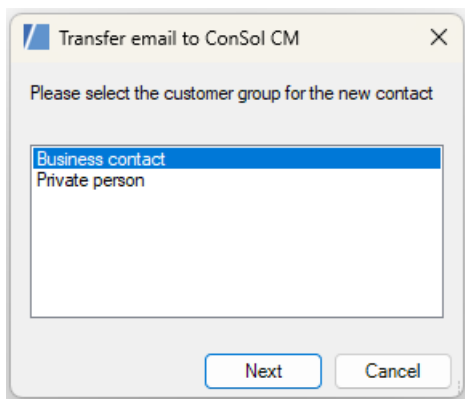

Figure 7: *Window to select the customer group*

In two-tier customer data models, the system automatically searches for a suitable company, e.g. based on the company name or the domain of the email address that other contacts of the company have. The contact is then assigned to this company. If there are several companies in the customer group that match the contact, a pop-up window, where you can select the desired company, is shown:
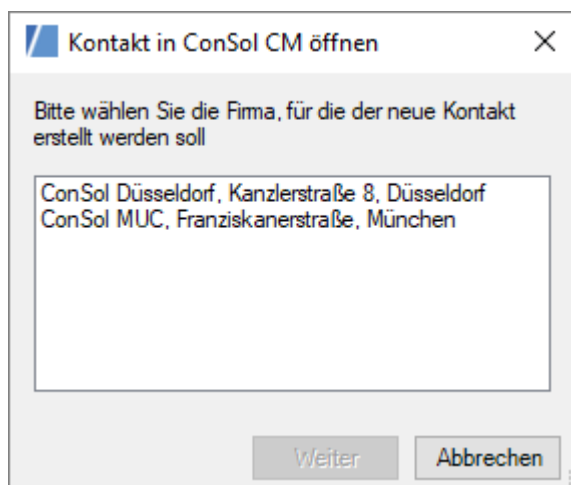
> When a contact is created, the email address, first name, last name and telephone numbers are transferred, depending on the configuration.

3.4 Creating a case

The ConSol CM/Outlook add-in allows you to create a new case in ConSol CM.

3.4.1 Situation

You are reading an email which is needed as a case in ConSol CM.

3.4.2 Prerequisites

You have the necessary permissions to create cases in ConSol CM. If the contact of the email is not yet saved in ConSol CM, you also need the permission to create contacts.

3.4.3 Procedure

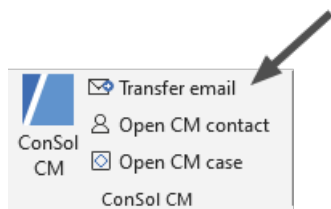Click *Transfer email* in the ConSol CM/Outlook add-in.

Figure 8: *Transfer email from Microsoft Outlook to ConSol CM*

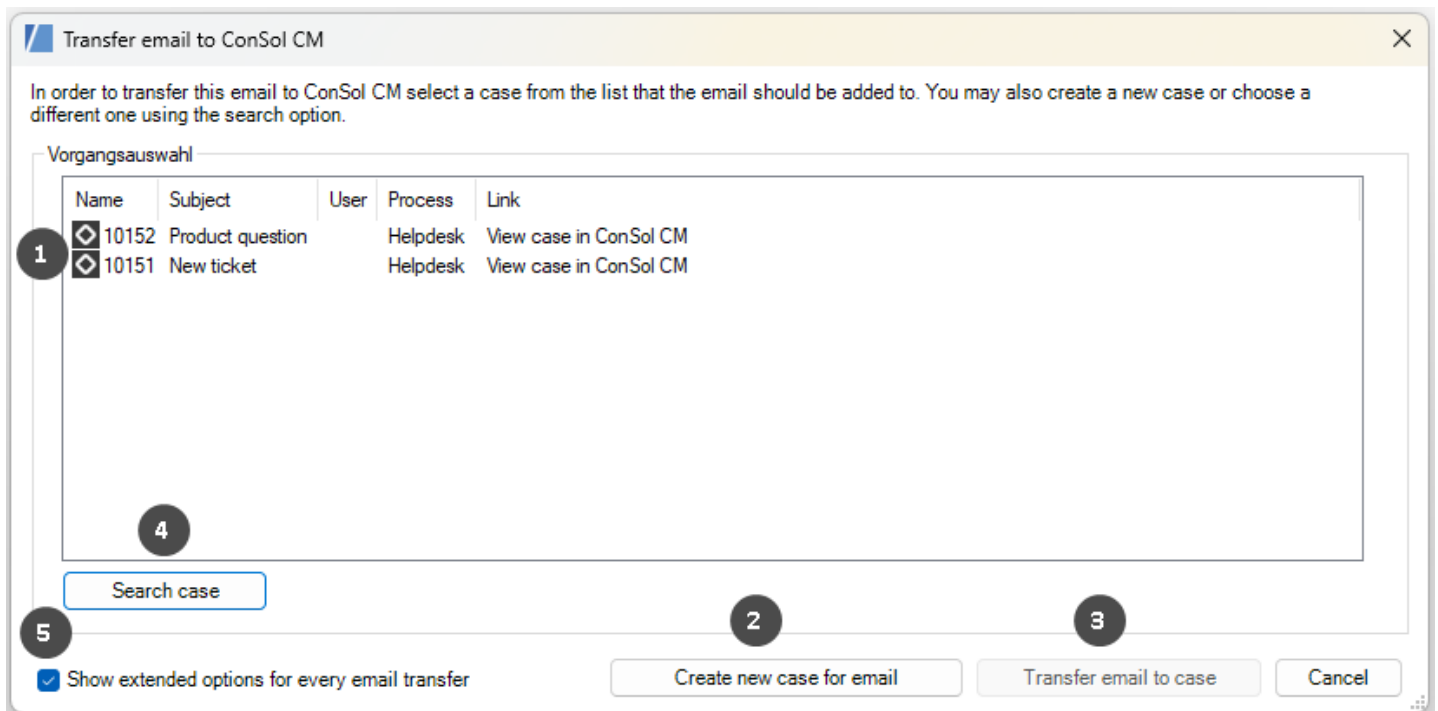A pop-up window where you can perform various actions is shown:

Figure 9: *Transfer email*

To create a new case, click *Create new case for email* (2). If there is no contact for the sender's email address yet, a new contact is created in ConSol CM first (see Creating a contact). If there are several contacts with the email address, a pop-up window, where you can select the desired contact, is shown.

If you have permission to create cases in more than one process, a pop-up window, where you can select the desired process, is shown:
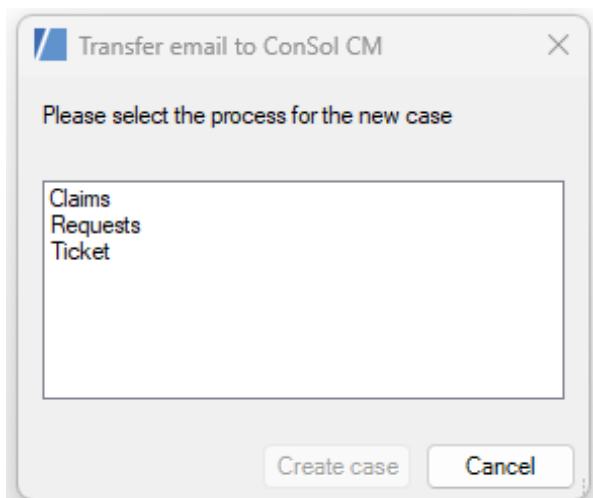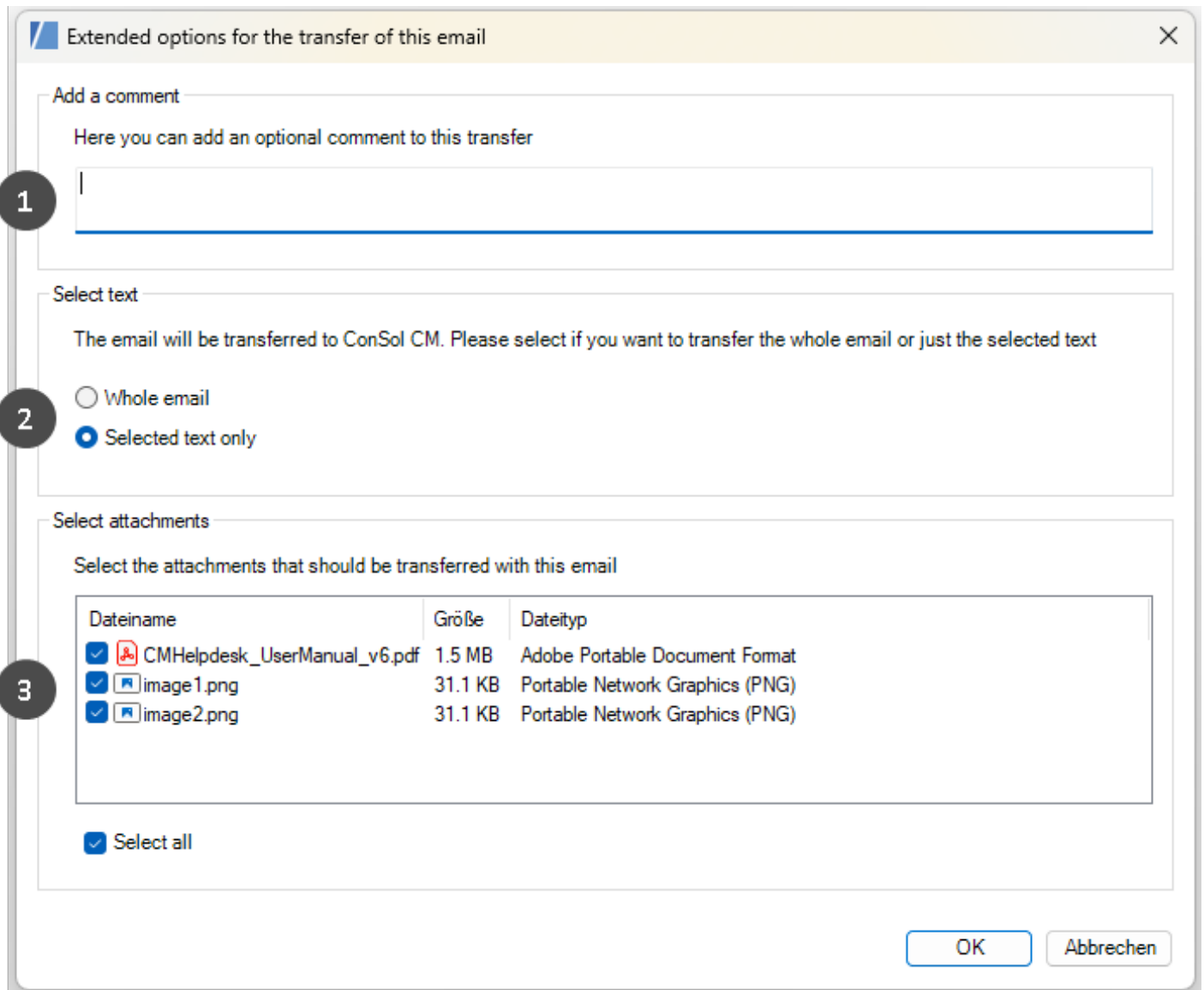

Figure 10: *Select process*

The newly created case contains the email as the first entry in the case history. Whether other case fields are set depends on the configuration of your system.

If the *Show extended options for every email transfer* checkbox (5) is selected, a window with additional options is shown after you have clicked the button to create a new case or transfer the email. There you can enter a comment for the transfer (1). If text within the email is selected, you can decide whether the entire text or only the selected part should be transferred (2). If the email contains attachments, you can select the attachments to be transferred with the email (3).

If the *Show extended options for every email transfer* checkbox is not selected, the window is not displayed and the default settings are used, i.e.

- There is no option to enter a comment.
- Even if text is selected, the entire email is transferred.
- All attachments are transferred

3.5 Attaching an email to a case

The ConSol CM/Outlook add-in allows you to transfer an email to ConSol CM and attach it to an existing case.

3.5.1 Situation

You are reading an email which is required for a case in ConSol CM.

3.5.2 Prerequisites

You have the necessary permissions to edit cases in ConSol CM.

3.5.3 Procedure

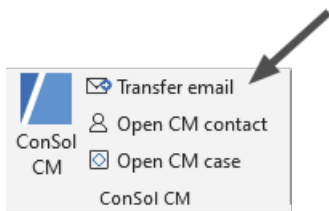Click *Transfer email* in the ConSol CM/Outlook add-in.

Figure 11: *Transfer email from Microsoft Outlook to ConSol CM*

A pop-up window, where you can select the desired case, is shown. To do this, click the case (1) and then *Transfer email to case* (3). If no matching case is found neither for the sender's nor the recipient's email address, you can create a new case (2).

If you want to attach the email to a case that is not displayed in the list because it belongs to a different contact than the email, you can search for any case using the *Search case* button (4). To do this, enter a term in the search window and click *Search*. The search results are displayed in the case list in the pop-up window. The search works in the same way as the quick search in the Web Client. The cases found are sorted by their last modification date.
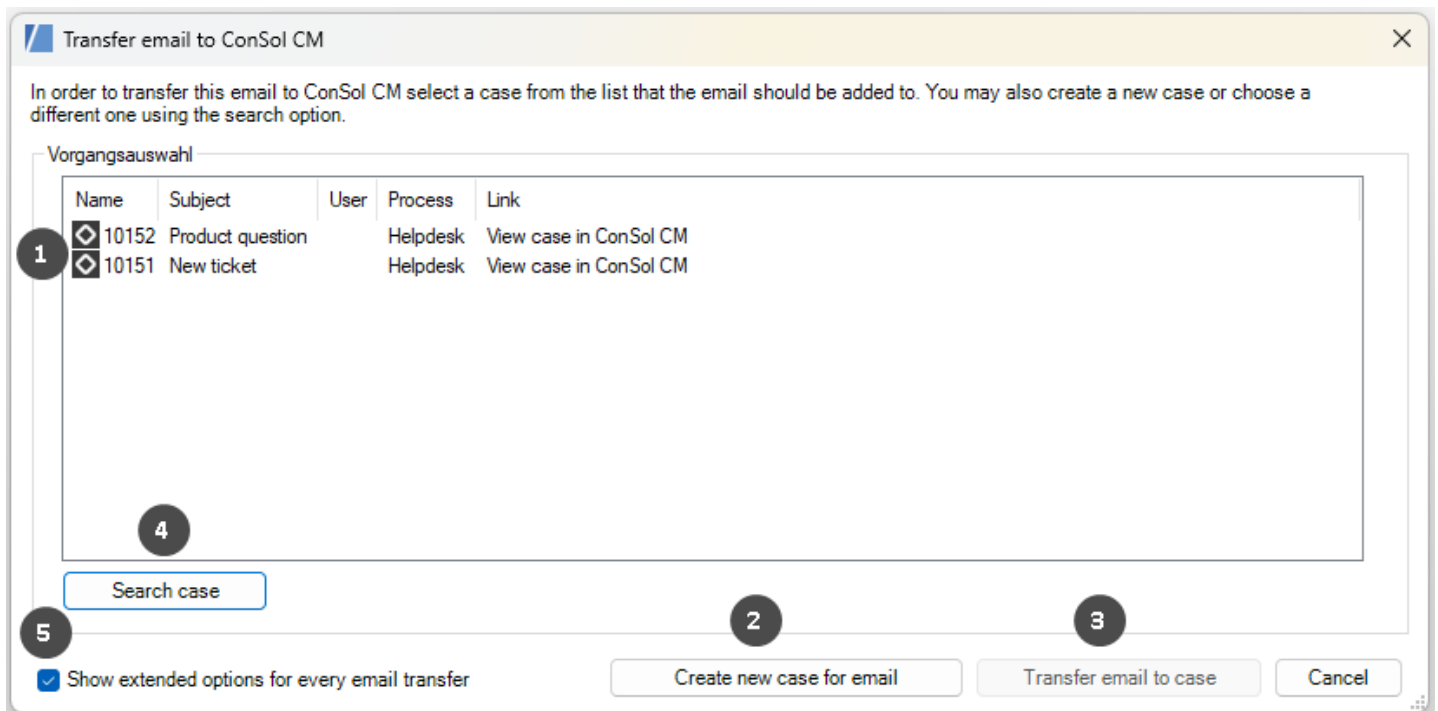
Figure 12: *Transferring an email*

Figure 13: *Search for a case*

If the *Show extended options for every email transfer* checkbox (5) is selected, a window with additional options is shown after you have clicked the button to create a new case or transfer the email. There you can enter a comment for the transfer (1). If text within the email is selected, you can decide whether the entire text or only the selected part should be transferred (2). If the email contains attachments, you can select the attachments to be transferred with the email (3).

If the *Show extended options for every email transfer* checkbox is not selected, the window is not displayed and the default settings are used, i.e.

- There is no option to enter a comment.

- Even if text is selected, the entire email is transferred.

- All attachments are transferred

The email is added to the case history as a new entry. Depending on the configuration, the history entry may be highlighted with a special text class that indicates that the email originates from Microsoft Outlook.

> The sender, recipient, subject, date and text are transferred from the email to ConSol CM.

3.5.3.1 Variant: Transferring text from an email

If you do not want to transfer the entire email text, but only part of the text, select the *Show extended options for every email transfer* checkbox. Select the text to be transferred and then click *Transfer email to case*. A pop-up window, where you can decide whether you want to transfer the selected text or the entire email, is shown.

If you do not display the advanced options, the entire text will be transferred automatically.

3.5.3.2 Variant: Transferring attachments from an email

If you do not want to transfer all attachments from an email, select the *Show extended options for every email transfer* checkbox. If you now click *Transfer email to case*, a pop-up window, where you can select the attachments which you want to transfer, is shown.

If you do not display the advanced options, all attachments will be transferred automatically. You can also transfer only the attachments without the email, see [Adding attachments from an email to a case](#).

3.6 Adding attachments from an email to a case

The ConSol CM/Outlook add-in allows you to add attachments directly from an email to any case in ConSol CM.

3.6.1 Situation

You have an email with attachments open in Microsoft Outlook. You need these attachments in ConSol CM, but do not want to transfer the rest of the email.

3.6.2 Prerequisites

You have ConSol CM open in your default browser and are logged in there. You have opened the attachment upload area of a case in ConSol CM.

3.6.3 Procedure

In Microsoft Outlook, click the attachment and drag it into the open attachment upload area in the case history of the Web Client.
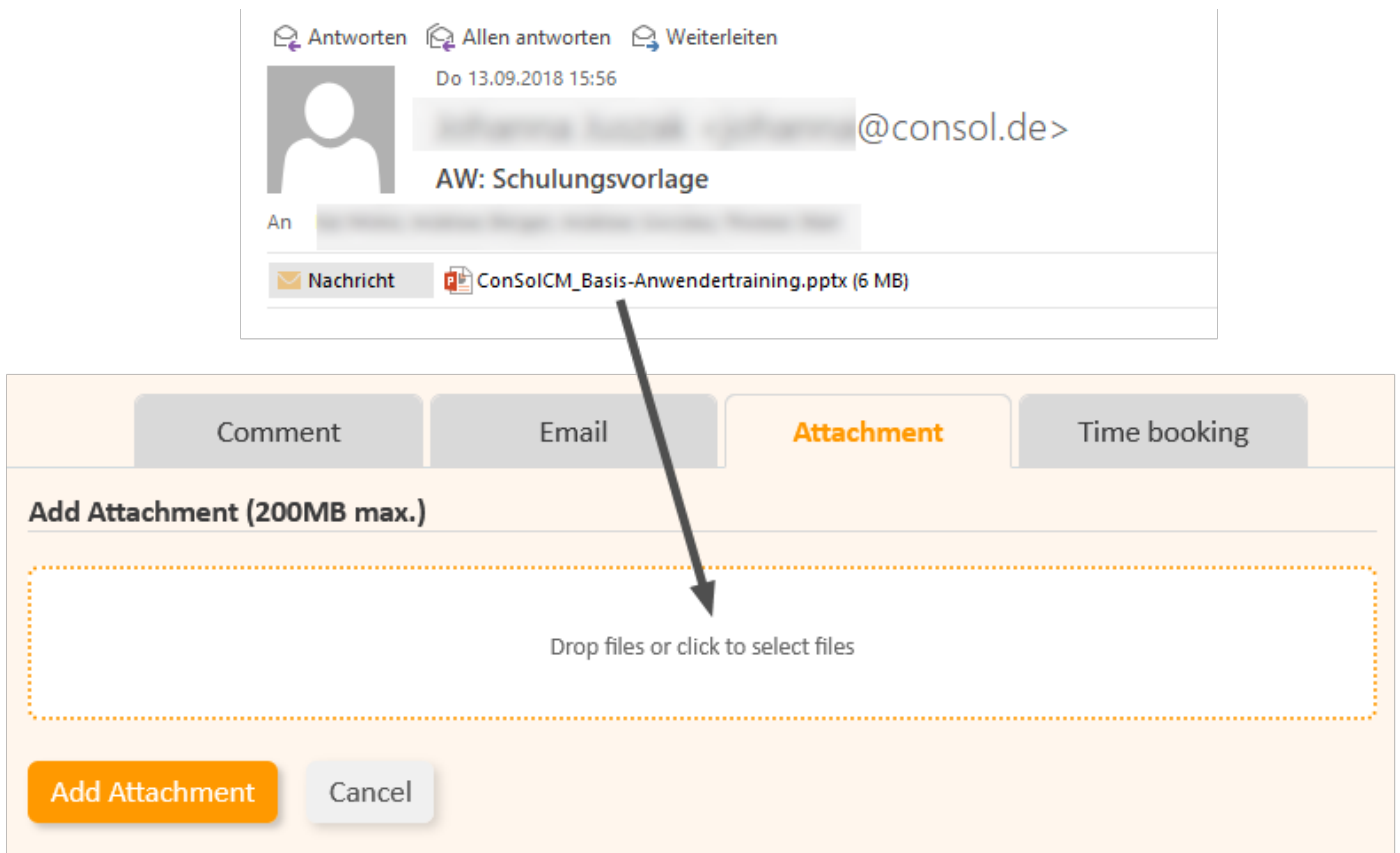
Figure 14: *Transfer an attachment with drag-and-drop*

The attachment is now available in the attachment section of the case.

4   Troubleshooting

4.1   Add-in is not displayed

Problem: The ConSol CM/Outlook add-in is not displayed after installation.

Solution: Go to the *Add-Ins* tab under *Start -> Options* and click *Manage*. Select the checkbox next to *ConSol CM Outlook AddIn*.

5 Appendix

5.1 Trademarks

- Microsoft® Outlook® - Microsoft and Microsoft Outlook are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. See Microsoft website for trademarks and brands.