

How to Use the Microsoft Outlook Add-in

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The Outlook Add-in

The Microsoft Outlook Add-in is an integration that allows TempWorks users who are also working with Outlook to get the most out of their email and their database. This add-in is a sidebar that can be utilized in both the application and the browser-based platforms for Outlook.

Key Functionality in the Outlook Add-in Sidebar

- Manually creating records, both employee and contacts.
- Creating an employee record by parsing in a document such as a resume.
- Pulling in emails as messages in existing records both employee and contacts.
- Logging separate messages in records apart from email.
- Viewing past related messages to an employee or contact.
- Accessing contact methods as well as linking to a records contact address via maps.
- Import documents from an email.

Note The Outlook Add-in is currently only available for our hosted clients & utilizes Beyond™. If you have not set up Security Groups or utilized Beyond, please talk to your Account Manager first. In order to log messages within the Outlook Add-in and Beyond, each user will need to be part of a [Message Action Security Group](#). In order to parse resumes, or save documents, you will need to be part of a [Document Type Security Group](#).

In order to Utilize the Outlook Add-in, it must first be installed by your IT Admin. For installation instructions, see [Setting Up the Outlook Add-in](#).

This article covers:

1. Finding the Add-in
2. Creating a New Record
3. Logging Emails on a Record

Finding the Add-In

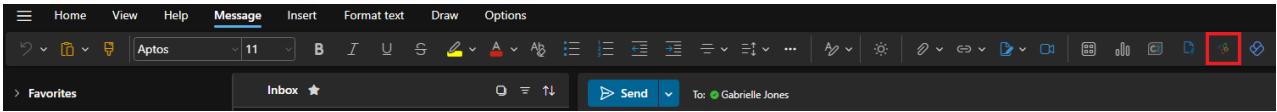
After the add-in has been made available to you by your IT admin, you will be able to see the TempWorks Outlook Add-in Option within email.

To Open the TempWorks Add-in:

When looking at an email, you will see the "TempWorks" logo in the upper right of an email:



While replying to or forwarding an email, the "TempWorks" logo will appear in your home tool bar:



Note The add-in is only available on messages and appointments while composing or reading. For a full list of limitations on the add-in see Microsoft's [Outlook Add-in Overview](#).

When accessing the sidebar, you may be required to enter your credentials. A separate window will open for you to enter your credentials in.

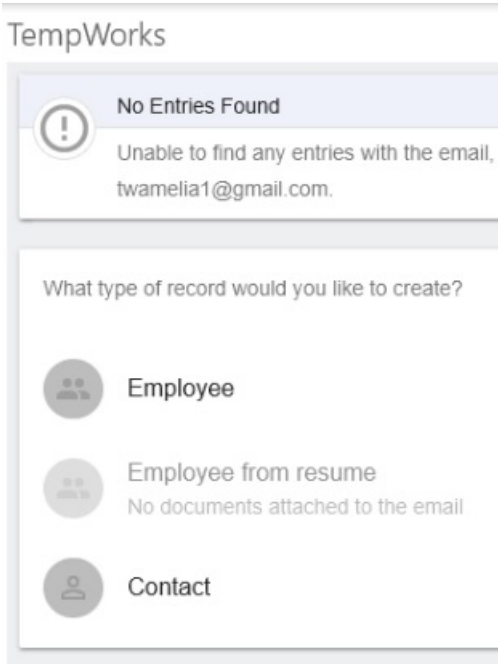
Enter your credentials as though you were logging into Enterprise or Beyond. You do not need to use the 'host\' as part of your username.

Now that your Outlook has been synced to a database, the sidebar will search for records in your database that are associated with the contact information from the email.

Creating a New Record

Upon opening the sidebar, TempWorks will search your system for an existing record.

If none exist, you will have the option to make one:



Using the add-in, you will be able to add:

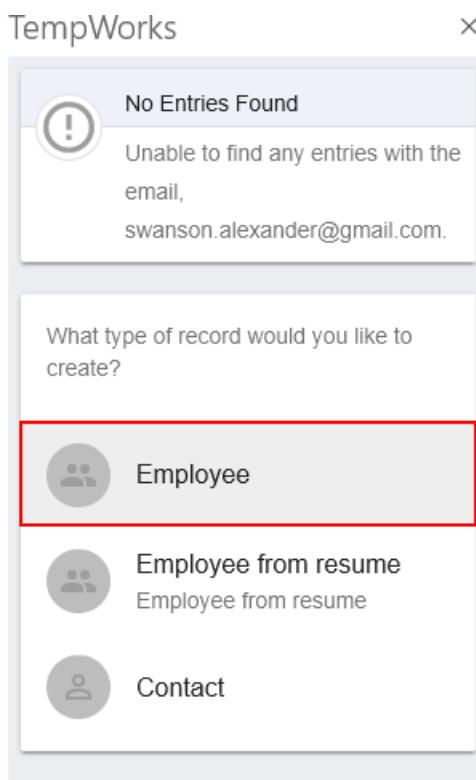
1. Employee Record
2. Contact Record

Adding a New Employee

Two options exist for creating an employee:

1. Creating the record based off the email's contact info
2. Creating a record based off an attached document (resume)

When creating a record from the employee's contact info, select 'Employee' to manually create the record:



This will allow you to quickly make the employee with only basic info:

! **Create employee**
Quickly create an employee

First Name *
Alexander

Last Name *
Swanson

Email
swanson.alexander@gmail.com

Country- Cell Phone
U.S. +1 |


Country *
United States of America ▼

Branch *
▼

State *
▼




CANCEL SAVE

Alternatively, selecting 'Employee from resume' will create a record from the employee's attached resume:



 **No Entries Found**



Unable to find any entries with the email,
swanson.alexander@gmail.com.

What type of record would you like to create?



-  **Employee**
-  **Employee from resume**
Employee from resume
-  **Contact**



Utilizing this option will save the resume to the employees file and attempt to parse past job information.

 **Greg Matterhorn** 4295080876 



 455 Oak Hill Road
Chaska MN 55318 

Contact Information

 **G.Matterhorn212@g...** 
Primary Email

 **(922) 123-4309** 
Primary Phone

Documents

 **Greg Matterhorn.doc** 
56.21 KB

Log a message

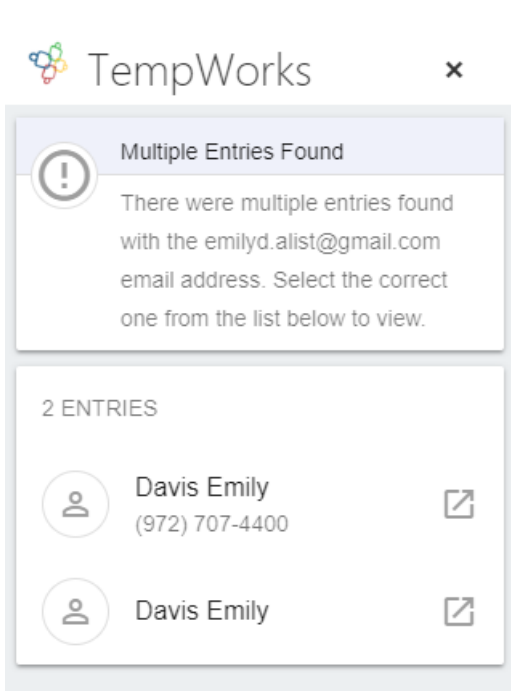
MESSAGES STORY INTEREST C

No Messages

Logged messages will display here





Once the record has been created, interacting with any email from the employee will allow you to access their sidebar.

Note If more than one record exists, you can use the 'open window' button to open the record in Beyond to confirm:



The image shows a window titled "TempWorks" with a close button (x) in the top right corner. Below the title bar is a notification box with a warning icon and the text: "Multiple Entries Found. There were multiple entries found with the emilyd.alist@gmail.com email address. Select the correct one from the list below to view." Below the notification is a section titled "2 ENTRIES" containing two entries, each with a person icon, the name "Davis Emily", the phone number "(972) 707-4400", and an "open window" icon (a square with a diagonal arrow).

2 ENTRIES

-  Davis Emily
(972) 707-4400 
-  Davis Emily 



Once the contact/employee is selected, they will appear in the sidebar as though it were the [quick view bar](#) in Beyond. Here, messages can be logged and interacted with:

TempWorks

Amy Anderson 11619

No Address Entered

Contact Information

twamelia1@gmail.com
Primary Email

no data
Primary Phone

Log a message

Message Action
Order Request

Include email in message

CANCEL SAVE

MESSAGES STORY INTEREST CODES

No Messages
Logged messages will display here


VIEW ALL IN BEYOND

Adding a Contact




New contacts can be added when interacting with an email that has contact methods not found in your data base.

Select the contact option to add a new contact:

TempWorks


 **No Entries Found**
Unable to find any entries with the email,
twamelia1@gmail.com.

What type of record would you like to create?

-  **Employee**
-  **Employee from resume**
No documents attached to the email
-  **Contact**

Contact information will be populated based on the information provided in the email. Add or update any of the fields below:

TempWorks ×

 **Create contact**
Quickly create a contact

First Name *
Amy

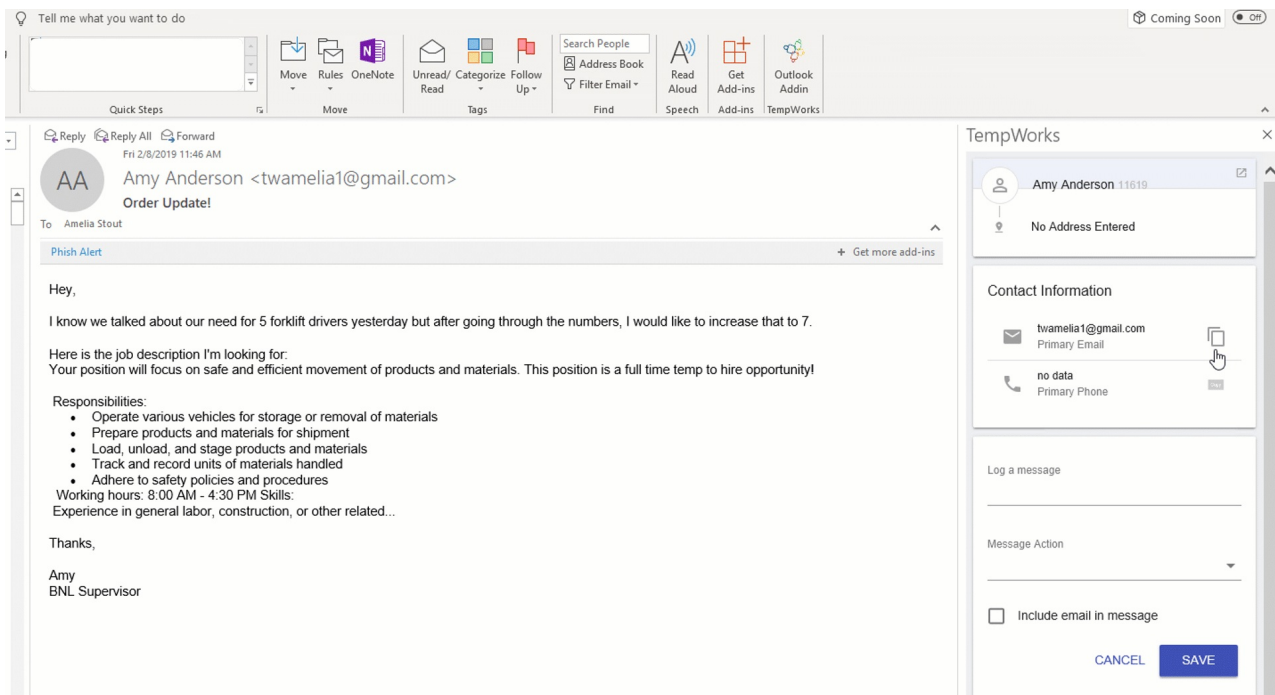
Last Name *
Anderson

Email
twamelia1@gmail.com

Country-Code Office Phone
U.S. +1

Select Save to save the contact.

Note The newly created contact has not been associated with a customer record when created within the add-in. Make sure you update the contact record in Enterprise or Beyond to include this information.



Logging a Message

When a contact or employee from your system emails you, you can utilize the Outlook Add-in to log a message on that persons' record without ever leaving your email.

Note In order to log messages within the Outlook Add-in and Beyond, each user will need to be part of a [Message Action Security Group](#). If they are not part of any Message Action Security Group they will not be able to see any message action codes in the drop down. The Security Group can limit what message action codes the user is allowed to use when logging messages.

To log a message:

1. Select the 'Log a Message' field.
2. Optionally, enter any information you want to add to the Log a message section
3. Select your message action code
4. If you want the body of the email included in the message, check the 'include email in message' checkbox
5. Select Save to post the message

TempWorks

Amy Anderson 11619

No Address Entered

Contact Information

twamelia1@gmail.com
Primary Email

no data
Primary Phone

Log a message

Message Action
Order Request

Include email in message

CANCEL SAVE

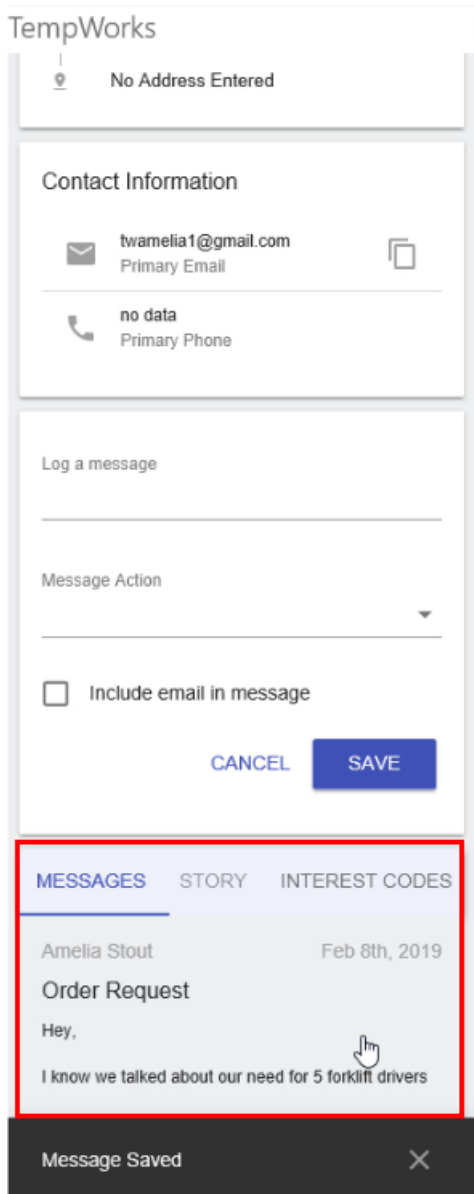
MESSAGES STORY INTEREST CODES

No Messages
Logged messages will display here

VIEW ALL IN BEYOND

Note Only message action codes that are employee AND contact relevant can be selected from the Outlook Add-in. For more information check out [Administrator Manual](#).

Messages can now be viewed in Enterprise, Beyond, or within the Outlook add-in itself:



Related Articles