

# 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

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## Finding the Add-In

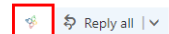
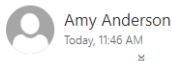
After the add-in has been made available to you by your IT admin, you will be able to see the TempWorks Outlook Add-in Option within email.

### To Open the TempWorks Add-in:

If you are logging into your email via the web, you will see the TempWorks' logo in the upper right of an email.

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Order Update!



Hey,

I know we talked about our need for 5 forklift drivers yesterday but after going through the numbers, I would like to increase that to 7.

Here is the job description I'm looking for:

Your position will focus on safe and efficient movement of products and materials. This position is a full time temp to hire opportunity!

Responsibilities:

- Operate various vehicles for storage or removal of materials
- Prepare products and materials for shipment
- Load, unload, and stage products and materials
- Track and record units of materials handled
- Adhere to safety policies and procedures

Working hours: 8:00 AM - 4:30 PM Skills:

Experience in general labor, construction, or other related...

Thanks,

Amy  
BNL Supervisor

While working in the application platform of Outlook, the TempWorks Outlook Add-in will appear in your home tool bar.

Outlook interface showing an email from Amy Anderson with the subject "Order Update!". The ribbon includes "Quick Steps", "Move", "Tags", "Find", and "Add-ins". The "Outlook Addin" button is highlighted with a red box.

Reply Reply All Forward  
Fri 2/8/2019 11:46 AM

**AA** Amy Anderson  
Order Update!

To

Hey,

I know we talked about our need for 5 forklift drivers yesterday but after going through the numbers, I would like to increase that to 7.

Here is the job description I'm looking for:  
Your position will focus on safe and efficient movement of products and materials. This position is a full time temp to hire opportunity!

Responsibilities:

- Operate various vehicles for storage or removal of materials
- Prepare products and materials for shipment
- Load, unload, and stage products and materials
- Track and record units of materials handled
- Adhere to safety policies and procedures

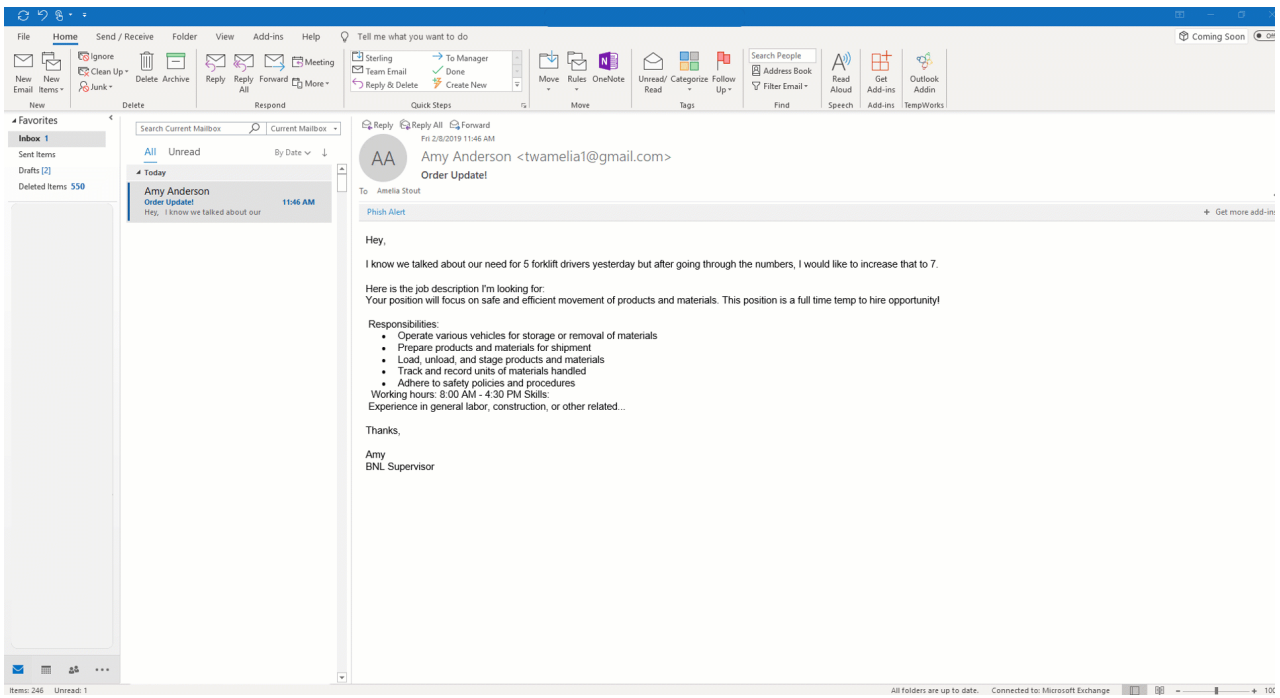
Working hours: 8:00 AM - 4:30 PM Skills:  
Experience in general labor, construction, or other related...

Thanks,

Amy  
BNL Supervisor

**\*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.

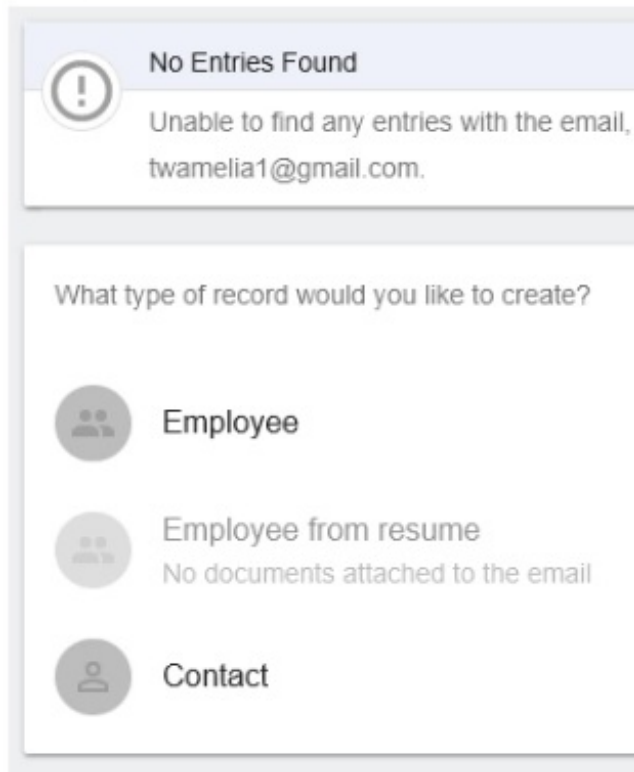
Now that your Outlook has been synced to a database, the sidebar will search for records in your database that are associated with the contact information from the email.

## 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:

## TempWorks



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:

 **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**

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.



## TempWorks

The screenshot shows a vertical sidebar for an employee named Greg Matterhorn. At the top, there is a header with a person icon, the name 'Greg Matterhorn', and a phone number '4295080876'. Below this is a location section with a location pin icon, the address '455 Oak Hill Road', and 'Chaska MN 55318'. The next section is titled 'Contact Information' and contains two entries: 'G.Matterhorn212@g...' labeled 'Primary Email' with a copy icon, and '(922) 123-4309' labeled 'Primary Phone' with a copy icon. Below that is a 'Documents' section showing a document icon, the name 'Greg Matterhorn.doc', and the size '56.21 KB'. The sidebar then has a 'Log a message' section with a text input field. At the bottom, there is a navigation bar with tabs for 'MESSAGES', 'STORY', and 'INTEREST C'. The 'MESSAGES' tab is selected, and the content below it says 'No Messages' and '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:



**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.

2 ENTRIES



Davis Emily  
(972) 707-4400



Davis Emily



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**

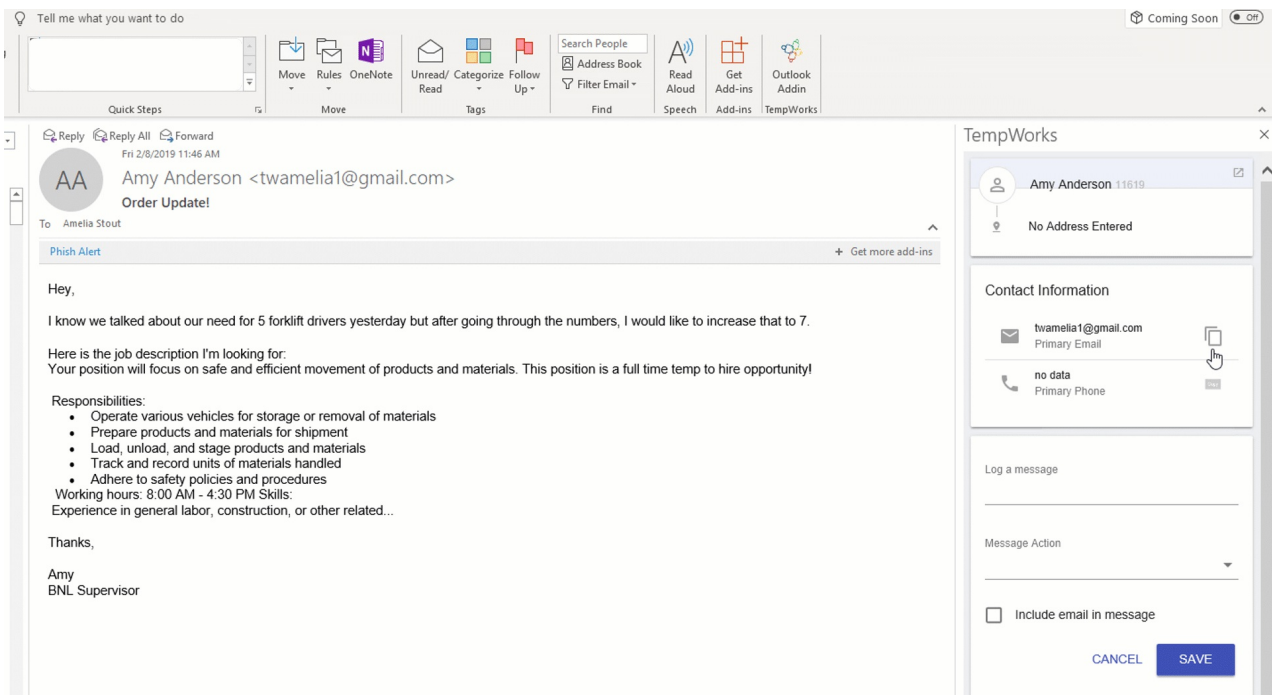
Last Name \*  
**Anderson**

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

The screenshot shows a web interface for TempWorks. At the top, there is a header for 'TempWorks' with a close button. Below this is a contact card for 'Amy Anderson' with ID '11619'. The contact information section shows 'twamelia1@gmail.com' as the primary email and 'no data' for the primary phone. A red box highlights a 'Log a message' form. This form includes a 'Message Action' dropdown menu currently set to 'Order Request', a checked checkbox for 'Include email in message', and 'CANCEL' and 'SAVE' buttons. Below the form are tabs for 'MESSAGES', 'STORY', and 'INTEREST CODES'. The 'MESSAGES' tab is active, showing 'No Messages' and a 'VIEW ALL IN BEYOND' link.

**\*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:

TempWorks

No Address Entered

### Contact Information

✉ twamelia1@gmail.com  
Primary Email

☎ no data  
Primary Phone

Log a message

Message Action

Include email in message

CANCEL SAVE

---

MESSAGES STORY INTEREST CODES

Amelia Stout Feb 8th, 2019

**Order Request**

Hey,

I know we talked about our need for 5 forklift drivers

Message Saved X



# Related Articles