Legrand CRM Outlook Add In

Overview

Legrand CRM provides a convenient interface between Microsoft Outlook's email folders and the Legrand CRM database enabled with an Outlook AddIn. The AddIn significantly improves day-to-day productivity and provides an alternative way to archive email in Legrand CRM sent or received via Outlook.

Email held within an Outlook email folder can be selected and transferred into Legrand CRM using an additional menu item directly from within Outlook's right mouse menu.

Email can be individually selected, or selected in groups, to be stored in Legrand CRM. The transfer function automatically copies and attaches a copy of the Outlook email as a .msg file with the Legrand CRM Activity Note. Once transferred, email can now be deleted from Outlook with a complete copy stored in Legrand CRM.

Set up is performed from within the Outlook Options menu and is a simple three step process.

Email transfers from the **Inbox** and other mail folders are initiated from the right mouse button menu and for the selected email using any one of three functions; **Assign to Sender**, **Assign to Other** and **Assign and Link**. From the **Sent Items** folder in Outlook the options are **Assign to Recipient**, **Assign to Other** and **Assign and Link**.

Prerequisites

The Legrand Outlook Add-in module was designed for Microsoft Outlook 2003. It will not work with earlier versions of Outlook.

Also note that the Add-in module uses .NET Framework 2 and Visual Studio Tools for Office (VSTO) runtime components. These components will be installed on the computer if not yet in use.

Legrand CRM's Outlook Add In

In v4.50 Legrand Software introduced a new feature that allows email to be transferred from Outlook into Legrand CRM. This feature now allows users to work more effectively from within Outlook reducing the need to enter the Legrand CRM MS Outlook module.

There are three main features:

1. Export email directly into Legrand CRM whilst in Microsoft Outlook
2. Attach immediately to existing items in Legrand CRM's Opportunity, Campaign and Customer Service modules when exporting email
3. Export and store email immediately into Legrand CRM when sending from Outlook's email client

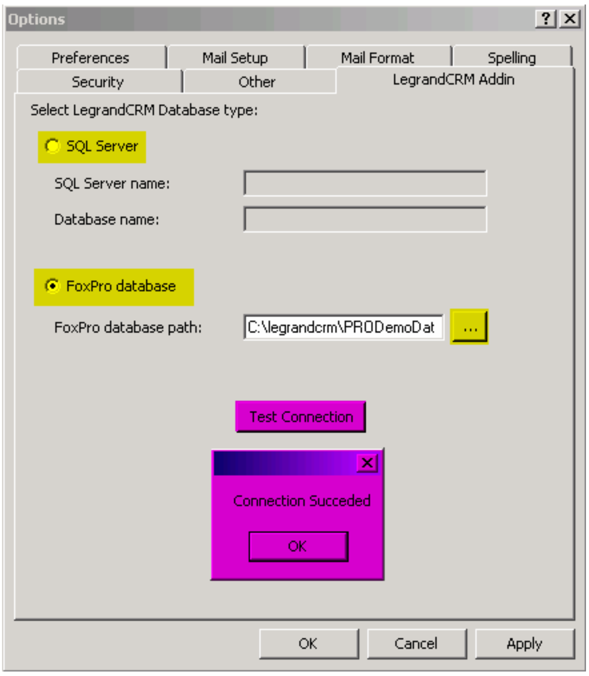
During installation of v4.5 the installer will detect whether Outlook is installed on your computer. If the installer detects MS Outlook the Add In will be automatically installed.

Setup

The Add In is setup in Outlook under the menu command **Tools>Options**. The Options dialogue box will now display a new tab LegrandCRM Addin.

In this new tab simply select the type of Legrand CRM database which to connect. Both Legrand CRM STD and PRO Editions use the FoxPro database selection. Use the ellipsis button to navigate to your database CRM.DBC file.

For CORP Edition users select the SQL Server radio button. The values entered into the SQL Server name and Database name are the same as displayed in the Legrand CRM Login screen.



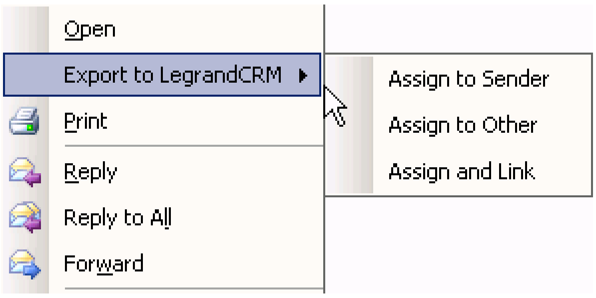
Use the **Test Connection** button to verify the values entered into the setup fields.

If the connection fails it's simply a typing error or the path to the CRM.DBC file no longer exists.

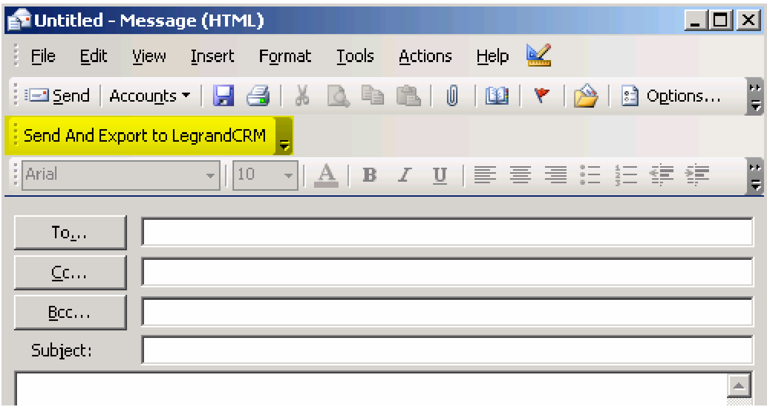
New Menus in Outlook

The two new functions are accessed from:

1. A set of new right mouse menu functions



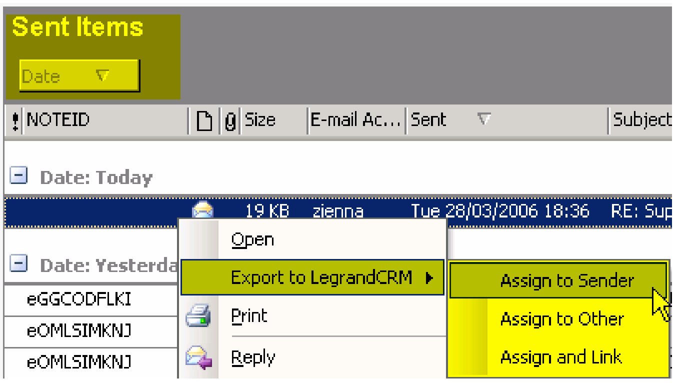
2. A new "send" button located in the Outlook Message form



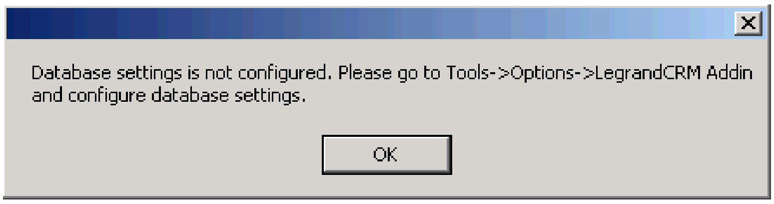
Operation of *Assign To Sender* function

To use the Legrand CRM Outlook Plug In simply open Outlook and select any email folder (incoming email folder or Sent Items folder).

1. Select an email and invoke the right mouse menu.
2. If the Plug In is correctly configured the **Export to LegrandCRM** menu will become available.

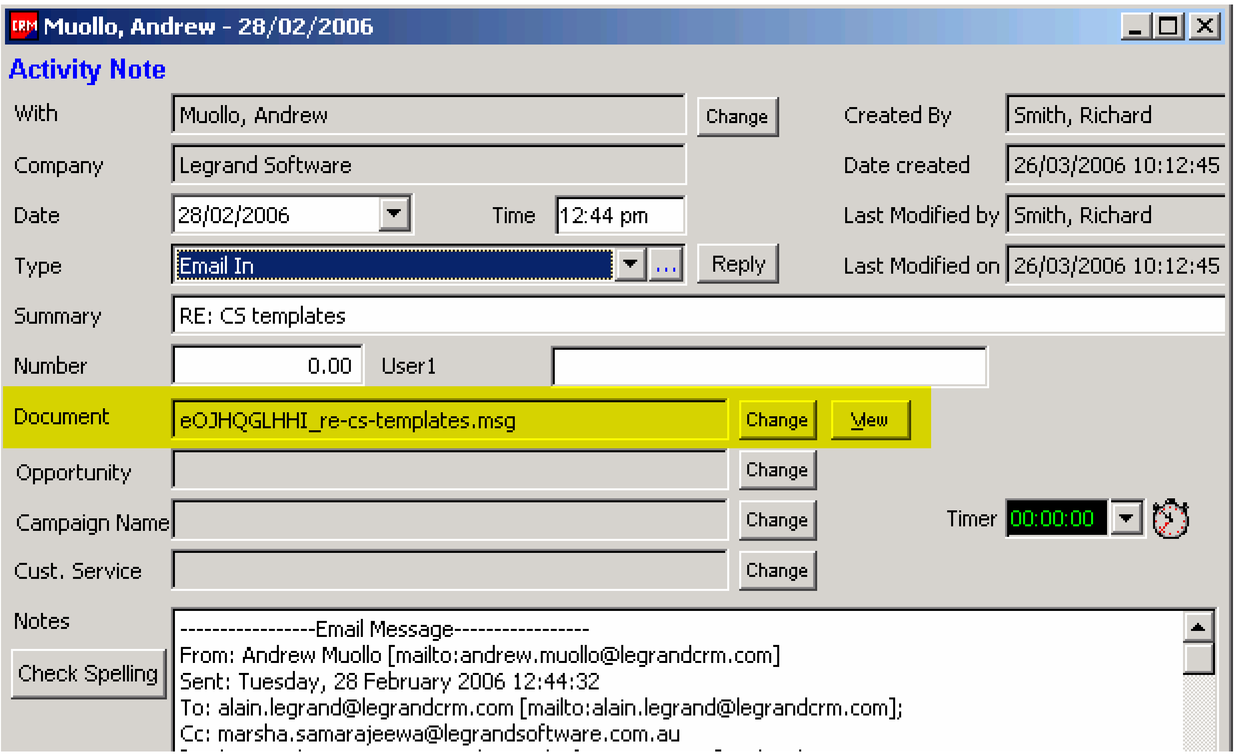


3. If the Plug In is *incorrectly* configured the following message will be displayed.



Simply return to the **Tools>Options** screen in Outlook to complete the configuration and use the Test Connection button to ensure correct configuration.

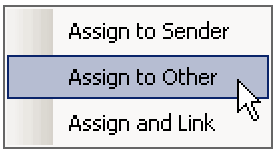
Email can be assigned automatically to the Sender, alternatively to another Contact existing in the Legrand CRM database.



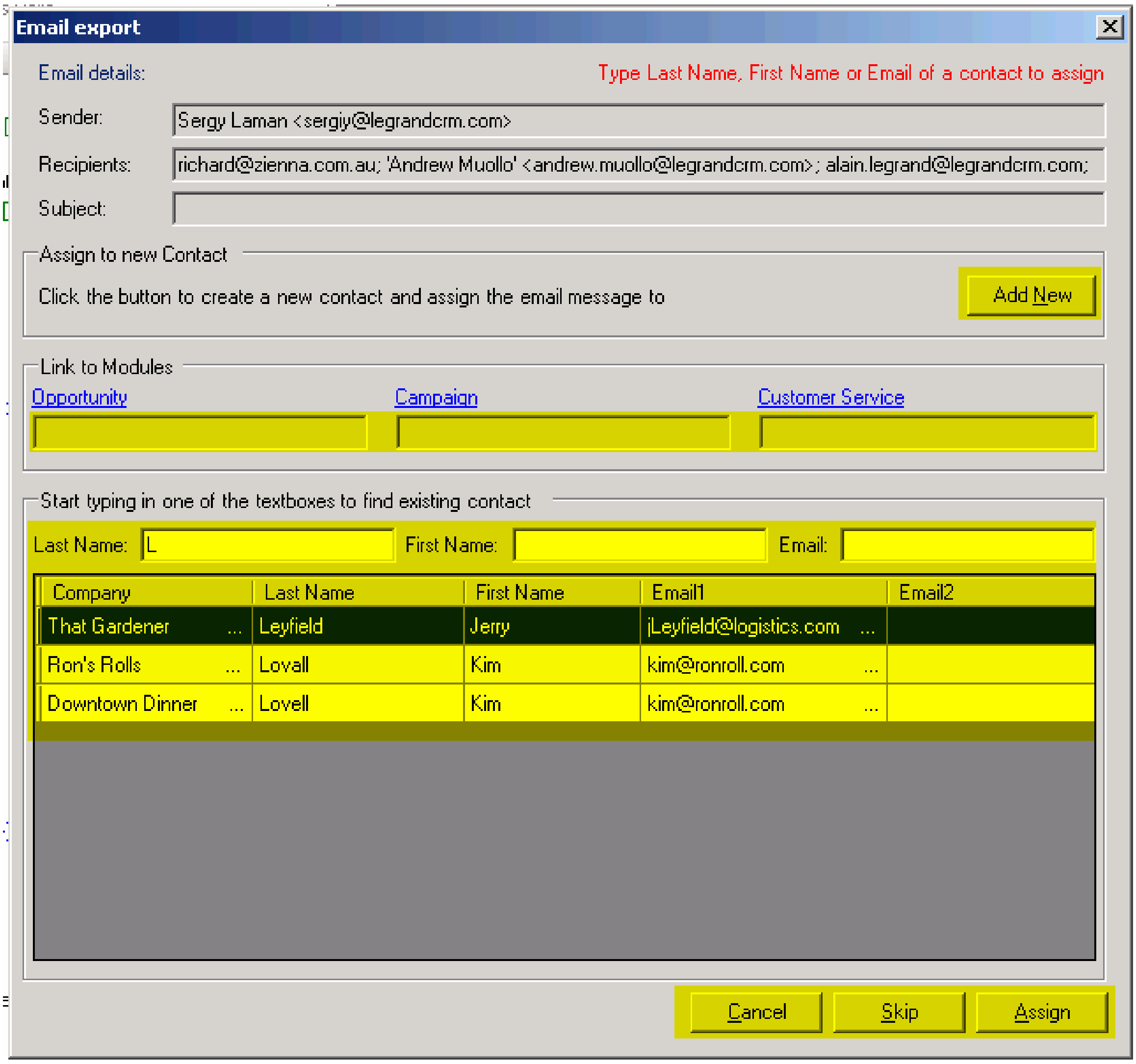
When using the **Export to Legrand CRM>Assign to Sender** function and the sender's email address is located within the Legrand CRM database either in the **Email1** or **Email2** fields the email will automatically be converted into an Activity Note and attached to that Contact. The email itself will be attached to the Activity Note as an .msg file. This means the email itself is permanently stored in Legrand CRM, including all the attachments. To view the actual email, including access to all the attachments, simply click on the View button from within the Legrand CRM Activity Note to launch Outlook's message viewing form.

When the email is successfully transferred an entry into the NOTEID field will be displayed AFTER another email is selected. To learn how to display the NOTEID column go to **Displaying the NOTIED**.

Using the *Assign to Other* function



When using the **Assign to Other** or the **Assign and Link** function the following dialog box is displayed:



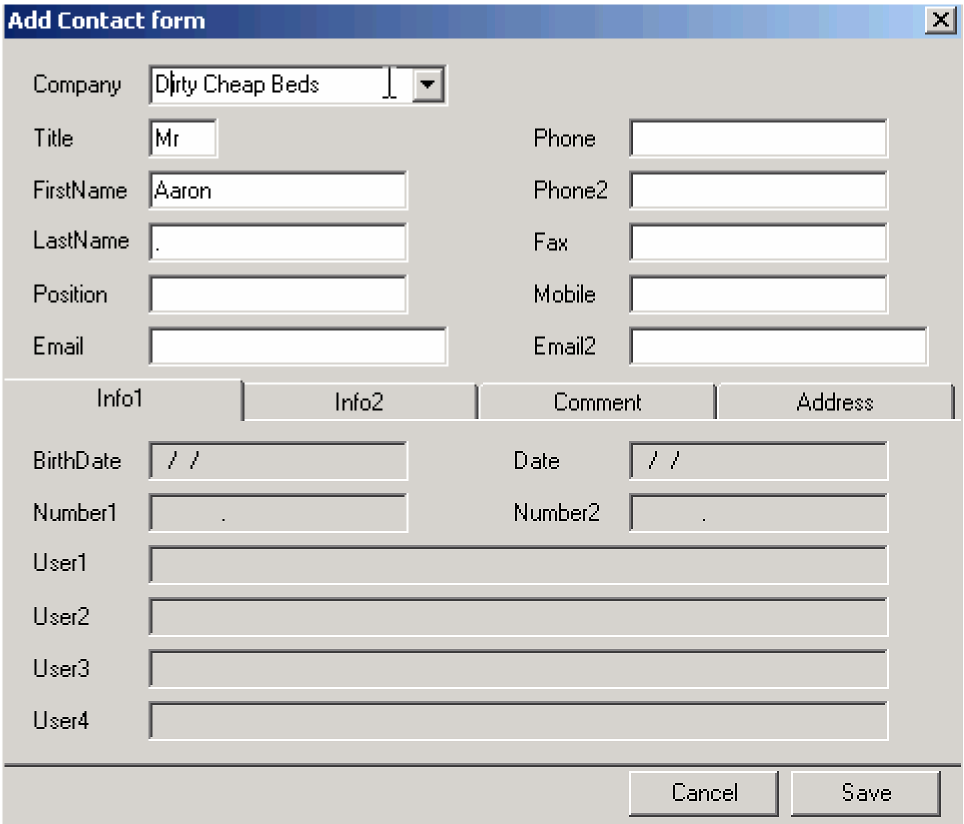
To filter the list simply enter text into the **Last Name**, **First Name** and **Email** fields to locate the Contact to which the email will be attached.

Double-click on the name, or use the Assign button to complete the action. Use the ***Alt*** key to bring up the shortcut keys, **Alt-C**, **Alt-S** and **Alt-A**.

The Add New Button

In those cases where there is the need to add a new Contact during the export of email into Legrand CRM the Add New button will display the Add Contact form. Using this form a new Contact can be added to an existing Company (using the Company drop down selector).

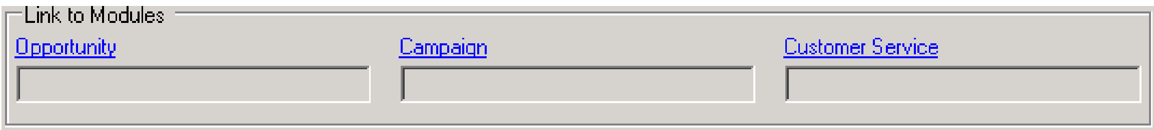
To activate the Company drop down selector simply click inside the box and begin typing the Company name. The drop down selector will then filter the list using the characters entered.



When Save is clicked the Contact will be created and the email automatically attached to an Activity Note.

The Link to Modules section

Use the Link to Modules hyperlinks to link the Activity Note directly to another record in the database. The Activity Note can be immediately linked to an Opportunity, Campaign or a Customer Service issue.



The filtering section

The Hyperlinks will be displayed in blue once Contact names appear in the list. To reveal the blue hyperlinks simply begin typing in the filter fields, shown below.

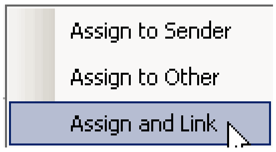
The email will be attached to the Activity Note as a .msg file. See the screen shot of the Activity Note further above. As the entire original Outlook email is attached, all the attachments are consequently also stored.

Size of Database and synchronising times

Be aware that the size of the database will increase as more email with attachments is stored. Consequently synchronising duration in Legrand CRM STD and PRO Editions will be affected each time new email are stored.

For Legrand CRM CORP Edition users, the synchronisation duration of the Common Folder will be affected by the number of email being attached.

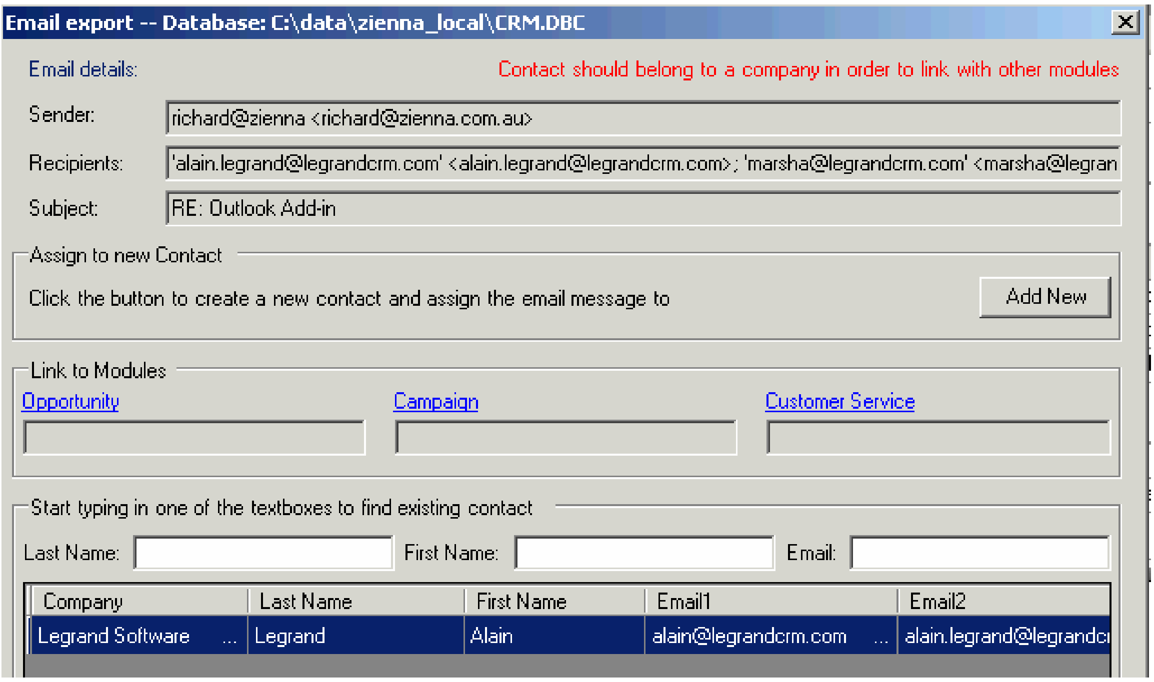
Using the *Assign and Link* function



The **Assign and Link** function displays the same input form as with the **Assign to Other** function. However the name of the Sender or Recipient is displayed in the list in preparation for assigning.

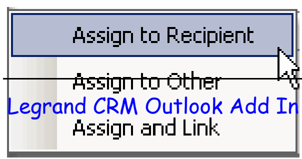
The purpose of separating the function is to clarify that a separate capability is available, namely the ability to link to another record (Opportunity, Campaign or Customer Servicce) in the database.

This feature allows the selected email to be assigned to the sender/recipient and simultaneously assigned to another record such as an Opportunity, Campaign or Customer Service issue. Simply click on the blue underlined field names to reveal a list of items from that module.



Using the *Assign to Recipient* function

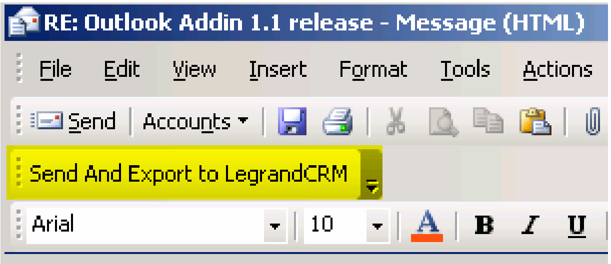
The Assign to Recipient function is available in the Sent Items folder only. When selected this function will automatically search for the Recipient's email address and create an Activity Note

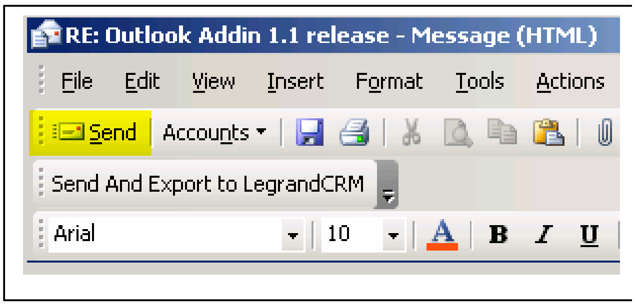


with the .msg file attached. If the recipient's email address is not located in either the Email1 or Email2 fields inside Legrand CRM the *Assign to Other* form will be displayed (see the *Using Assign to Other* function section above).

Using the *Send and Export to LegrandCRM* button

From within the Outlook Message form email can be immediately sent to the recipient and stored into Legrand CRM as an Activity Note attached to the recipient. Provided the recipient's name exists in the Contact list of Legrand CRM the function will perform automatically.





Simply click on the **Send and Export to LegrandCRM** button (**Alt-X**) to perform the function.

If, however, the recipient's email address does not exist in either the **Email1** or **Email2** address of any Contact in the Legrand CRM database the dialog box shown further above, Email export, will be presented.

Alternatively simply click on the normal Outlook **Send** button (**Alt-S**) to just send the email as per normal.

Conclusion

The Legrand CRM Outlook Add In provides a time-saving and effective way directly within Outlook to manage email both sent and received.

The Add In is operated from a familiar environment in which most users spend much of their day. It streamlines day-to-day management of email and the Legrand CRM system allowing the user to work quickly and productively.