



BUSINESS SOFTWARE GROUP

New Outlook Add-In for TriSys Apex '26

BSG Data Capture sends the email you are reading in Outlook to TriSys Apex with one button. In TriSys Apex you read it, process a CV from it, add the people in it, and file it to their history.

For TriSys Apex users and Business Software Group support · add-in version 2026.09.30.1650 · 1 October 2026

1. At a glance

The **BSG Data Capture** add-in replaces the previous TriSys Outlook add-in. It works in the new Outlook for Windows and in Outlook on the web, and it needs nothing installed on your computer.

Once	Every email
1. Install the add-in in Outlook (section 3). 2. Register and confirm it in TriSys Apex (section 4).	1. Select the email in Outlook and open BSG Data Capture. 2. Click Send. 3. Work with it in TriSys Apex (sections 5 and 6).

What you can do with an email in TriSys Apex

- **Read it**, with its attachments, in the **BSG Capture E-Mail** form.
- **Process a CV** attached to it in CV-Swift or CV Auto-Recognition. Saving the candidate files the email to their history.
- **Add the people in it**: create a new contact, or add the address to a contact you already have.
- **Create Note/History**: one Note/History task with the email attached, linked to the contacts you choose.

2. What you need

Requirement	Details
A TriSys Apex '26 login	You use TriSys Apex at app.trisys.co.uk . You must be logged in there when you register, and to receive emails.
A Microsoft mailbox	A Microsoft 365 work or school mailbox, or an Outlook.com mailbox. Mailboxes hosted by Google (Gmail, Google Workspace) can't run Outlook add-ins, even when read in Outlook.
A supported Outlook	The new Outlook for Windows, or Outlook on the web. The add-in is not available in Outlook on phones and tablets.
Your mailbox address known to Business Software Group	The mailbox you register must be the email address Business Software Group holds for you as a TriSys Apex user. Registration checks this. If you use a different address, ask us to add it first (support).

Why the address matters

Registration is confirmed inside your own TriSys Apex, so nobody else can register your mailbox. Business Software Group finds your TriSys Apex login from the mailbox address, so the address must belong to you, and to nobody else, in our records.

3. Install the add-in (once)

Your IT administrator may already have installed it for everyone (see *For IT administrators* below). If **BSG Data Capture** is already in Outlook's **Apps** list, go on to section 4.

Install it yourself

Open the install page: <https://api.trisys.co.uk/bsg-data-capture/outlook/install.html>. It has the same steps with a download button.

1. Click **Download BSG-Data-Capture.xml**. The small file goes into your Downloads folder.
2. In Outlook, select any email.
3. Click the blue **Apps** button (four small squares). The **Find an app** window opens.
4. Click **+ Get add-ins** at the bottom right. The **Add-Ins for Outlook** window opens.
5. On the left, choose **My add-ins**.
6. Scroll to **Custom Addins** at the bottom and click **+ Add a custom add-in**, then **Add from File....** (*Add from URL...* is greyed out: Microsoft has switched it off.)
7. Pick **BSG-Data-Capture.xml** from your Downloads folder and click **Open**.
 - Outlook warns that the add-in *may access your personal data and send it to a third-party service and has not been verified by Microsoft*. It says this for every add-in installed from a file. Click **Install**.
8. BSG Data Capture now shows **Added**. Close the window.

You do this once for each mailbox. The add-in then appears in every Outlook you use with that mailbox.

For IT administrators

To install it for everyone in your organisation, with nothing for users to do: Microsoft 365 admin centre › **Settings** › **Integrated apps** › **Add-ins** › **Deploy Add-in** › upload a custom add-in › **provide a URL for the manifest**:

<https://api.trisys.co.uk/bsg-data-capture/outlook/manifest.xml>

4. Register (once)

Registering tells Business Software Group which TriSys Apex is yours. You confirm it in TriSys Apex itself: there is no email code to wait for.

Before you start

Log in to TriSys Apex at app.trisys.co.uk in your browser, and leave it open. You will confirm the registration there.

In Outlook

1. Select any email, click **Apps**, and choose **BSG Data Capture**. The BSG Data Capture window opens over Outlook.
2. The window shows **Register with Business Software Group**:
 - **Name** and **Email** come from Outlook and can't be changed. The add-in registers the mailbox it is running in.
 - **Keep me informed about BSG products** is optional.
3. Tick **I have read and agree to the Business Software Group Privacy Policy, GDPR statement and Service Agreements**. **Register** stays greyed out until you do.
4. Click **Register**. The window shows **4 digits**, for example **1 4 7 9**, and waits for TriSys Apex.

In TriSys Apex

1. Within a few seconds TriSys Apex shows **Confirm BSG Data Capture Registration**, with your name, email, which Outlook asked, and when.
2. Click the same **4 digits** on the buttons 0 to 9. A clicked digit is highlighted; click it again to clear it. The order doesn't matter.
3. Click **Confirm**.

The BSG Data Capture window in Outlook moves on by itself, with **TriSys Apex** connected and ticked for every email. You are ready to send.

Good to know	
Time allowed	TriSys Apex must show the request within 30 seconds , and you then have 1 minute to confirm it. If time runs out, click Register again.
Wrong digits	Each wrong try clears the buttons. After 3 wrong tries the request is cancelled and TriSys Apex says so: click Register in Outlook again.
Deny	If you didn't click Register in Outlook, click Deny in TriSys Apex. That request ends.
Help	Press F1 on the TriSys Apex popup for help on it.

5. Send an email to TriSys Apex

1. In Outlook, select the email.
2. Click **Apps** and choose **BSG Data Capture**.
3. Make sure **TriSys Apex** is ticked, then click **Send**.

If TriSys Apex is...	What happens
Open and logged in	The window says it is waiting for TriSys Apex to confirm, and closes by itself once TriSys Apex has the email. The BSG Capture E-Mail form opens in TriSys Apex.
Not open, or logged out	The window shows Not confirmed and closes after 30 seconds. The email is kept for 24 hours and opens by itself the next time you log in to TriSys Apex.

Emails that arrive while you are away open one at a time when you log in: **Done** or **Discard** on one offers the next.

6. The BSG Capture E-Mail form in TriSys Apex

Press **F1** on the form for help on every part of it.

Part	What it does
Header	Who the email is from and to, the date, and Sent by : who sent it to TriSys Apex, and when.
Attachments	A button for each attachment opens it: PDFs and pictures open in TriSys Apex, Word and Excel files download. A CV (Word, PDF, RTF, ODT or text) also has Process CV .
Process CV	Opens the CV in CV-Swift (when it is switched on for you) or CV Auto-Recognition . When you save the candidate, the email is filed to their history automatically.
The email	The message itself, as it was sent. Only the email scrolls; the form always fits the window.
People in this email	Everybody the email was from, to or copied to. Type and Company show who they are in TriSys. <i>Not in TriSys</i> means no contact has the address yet; <i>(TriSys user)</i> marks your colleagues; Filed means the email is in that contact's history. Tick Select for the people you want, then use the buttons above the table.
Create Contact	For one selected person not in TriSys: creates a contact of any type with their name and address, then files the email to their history.
Assign E-Mail	For one selected person not in TriSys: adds the address to a contact you already have, in the e-mail field you choose.
Create Note/History	Creates one Note/History task with the email attached, linked to every selected contact. Nobody gets it twice.
Done	You have finished with the email. It is removed from BSG Data Capture; everything you filed stays in TriSys.
Discard	Removes the email from BSG Data Capture without doing anything with it.
Close	Closes the form. The email is not removed, but it does not open again by itself: use Done or Discard when you have finished.

7. The ☰ menu in the add-in

Menu	What it shows
Apps	Your Business Software Group apps, and whether each is ticked for every email (Always Selected).
Account	Your registration. Unregister removes your app connections and withdraws your consent; you can register again at any time.
About	The add-in version. Please quote it when you contact support.
Diagnostics	What the add-in read from the email and did. Copy log copies it, to paste into a support request.

8. Troubleshooting

Messages are shown in the BSG Data Capture window unless the table says otherwise. The text in brackets and names vary.

Message or symptom	What it means	What to do
BSG Data Capture is not in the Apps list	The add-in isn't installed for this mailbox, or the mailbox is hosted by Google.	Install it (section 3). Google-hosted mailboxes can't run Outlook add-ins.
"... is not a TriSys Apex user. Only TriSys Apex customers can register ..."	Business Software Group has no TriSys Apex user with this mailbox address, or the reason in brackets (for example, not an active subscriber).	Contact support with the address. Support: add the address to the customer's contact in BSG CRM, or check their TriSys Apex subscription.
"... belongs to 2 contacts in our records (contacts #... (E-Mail), #... (Additional E-Mail 3)) ..."	The address is on more than one contact, so we can't tell who you are.	Contact support. Support: the message names each contact id and the field holding the address; remove it from the contact it doesn't belong to.
"TriSys Apex isn't open for ... Log in at https://app.trisys.co.uk/ and press Register again."	Your TriSys Apex isn't open, so nobody can confirm.	Log in to TriSys Apex, then click Register again.
"TriSys Apex didn't show the registration request ... within 30 seconds ..."	TriSys Apex is open but didn't show the request: usually logged in as a different user, or an old browser tab.	Log in to TriSys Apex as yourself, refresh the page, and click Register again.
"... wasn't confirmed in TriSys Apex within 60 seconds ..."	The request timed out.	Click Register again and confirm within a minute.
In TriSys Apex: "... that was the last of 3 tries, so this registration request ... has been cancelled."	The digits clicked didn't match three times.	Click Register in Outlook again and click the new digits.
"The registration of ... was declined in TriSys Apex ..."	Deny was clicked in TriSys Apex.	If it was you by mistake, close and reopen BSG Data Capture and register again.
"Too many registration attempts for ... Please wait an hour and try again."	More than 6 attempts in an hour for this address.	Wait an hour.
Not confirmed after Send	No TriSys Apex acknowledged the email within 30 seconds.	Log in to TriSys Apex: the email opens by itself (within 24 hours).
Outlook warns the add-in "may access your personal data"	Outlook's standard warning for any add-in installed from a file.	Click Install .

9. For Business Software Group support

What registration records

- Registration is linked to the customer's **existing** contact in BSG CRM. Nothing about the contact or its company is changed.
- The contact gets a Note: *BSG Data Capture: registered, confirmed in TriSys Apex by ...*, with the Outlook, add-in version, and the Privacy Policy, GDPR and Service Agreements versions agreed to.
- The mailbox address is matched against the contact's **E-Mail**, **Alternative E-Mail** and **Additional E-Mail 1–4**. It must be on exactly one contact, who must be an active TriSys Apex subscriber with a login.
- TriSys Apex is connected to the TriSys Apex user who confirmed, and ticked for every email.

Helping a customer

- Ask for the add-in version (☰ › **About**) and the exact message.
- For anything unexpected, ask them to open ☰ › **Diagnostics**, click **Copy log**, and paste it into the support request.
- To start a registration again: ☰ › **Account** › **Unregister**, then register again.
- The emailed 6-digit code used by the earliest testers has been withdrawn; registration is only possible by confirming in TriSys Apex.

Privacy

Sending an email sends the whole email, with its attachments, to Business Software Group's servers at api.trisys.co.uk, which deliver it to the customer's TriSys Apex. An email not opened in TriSys Apex is kept for 24 hours; **Done** or **Discard** removes it from BSG Data Capture. See the [Privacy Policy](#), [GDPR statement](#) and [Service Agreements](#).

Links

What	Where
Install page	https://api.trisys.co.uk/bsg-data-capture/outlook/install.html
Manifest for IT administrators	https://api.trisys.co.uk/bsg-data-capture/outlook/manifest.xml
TriSys Apex	https://app.trisys.co.uk
Support	https://support.business-software.group/