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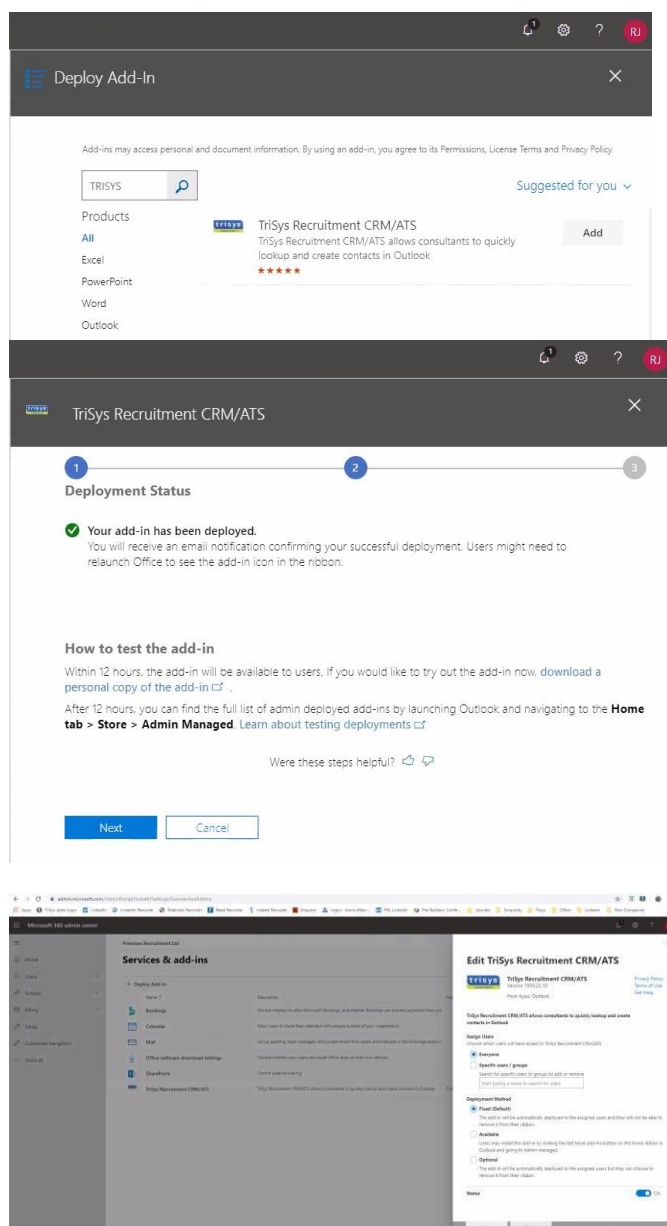
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Deployment of Office Add-Ins (Individual VS Centralised)

There are two methods for deploying Microsoft Office Outlook Add-Ins:

Deployment Method	Overview
Individual Deployment	<p>Each user directly installs the Add-In</p> <div data-bbox="435 629 1273 1294" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Very important: you must ensure you are using the following</p> <ul style="list-style-type: none"> • An active Microsoft Office365 Subscription plus Microsoft Office365 installed on your computer • Your Outlook MUST be connected to your Office365 e-mail account (not to a 3rd party email service provider otherwise the add-in isn't displayed due to Microsoft's own add-in usage policy) • Also you must be using either: <ul style="list-style-type: none"> ○ Microsoft Office Home and Business 2016 ○ Microsoft Office365 Business Premium ○ Microsoft Office Professional Plus 2019 ○ You may not use earlier Outlook versions as the new Add-In will not work with these older Outlook versions <p>You are required to have a Microsoft Office365 account/subscription with the 'Exchange' service included</p> <p>Once either of the above is confirmed, please proceed with reading this document.</p> </div> <div data-bbox="456 1350 1249 1529" style="text-align: center;">  </div>
Centralised Deployment	<p>Your IT support team centrally installs the Add-In</p> <p>This is often the case due to IT best practices i.e. centralized software deployment</p> <p>https://docs.microsoft.com/en-us/office365/admin/manage/manage-deployment-of-add-ins?view=o365-worldwide</p>

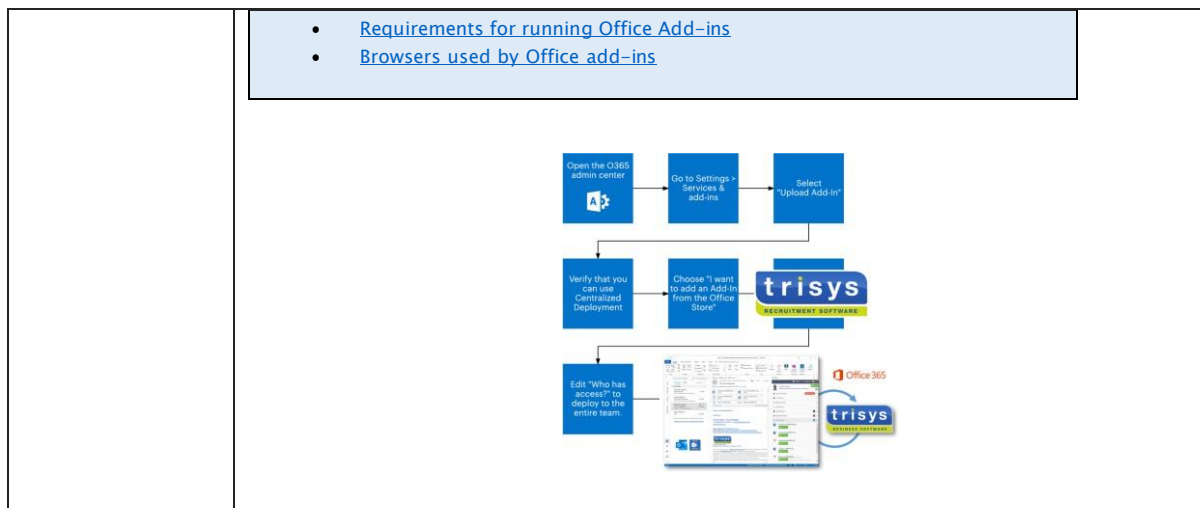
<https://admin.microsoft.com/AdminPortal/Home?ref=Settings/ServicesAndAddIns>



The screenshot shows the 'Deploy Add-In' window in the Microsoft Admin Center. It displays the 'TriSys Recruitment CRM/ATS' add-in, which is categorized under 'Products' and 'All'. The add-in is described as 'TriSys Recruitment CRM/ATS allows consultants to quickly lookup and create contacts in Outlook' and has a 5-star rating. The deployment status is 'Success', indicating that the add-in has been successfully deployed. Below the status, there is a section titled 'How to test the add-in' which provides instructions on how to verify the deployment and how to find the full list of admin deployed add-ins by navigating to the 'Home' tab > 'Store' > 'Admin Managed'.

Your IT Support team and/or e-mail services provider will need to consider the following Microsoft documentation which explains how to centrally deploy add-ins

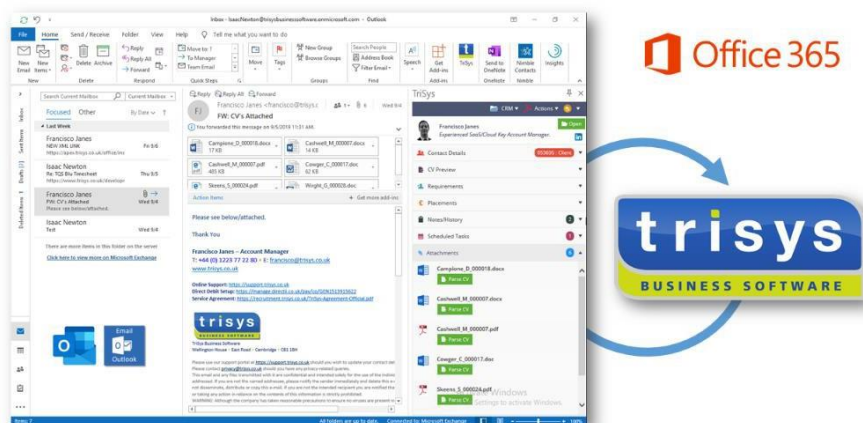
- [Overview of centralised deployment technology](#)
- [Will centralized deployment work for the organization](#)
- [Manage Office365 add-ins via admin center](#)
- [How to deploy add-ins to the Office 365 admin center](#)
- [Outlook Add-In requirements](#)



Request Your TriSys API Key

Your organization must have an active API Key (all our cloud customers have an API key created by default as part of their service, therefore only customers running TriSys within their own database server must explicitly request API key activation via support@trisys.co.uk should they wish to consider using the TriSys Outlook Add-In).

Benefits of Using the TriSys Outlook Add-In



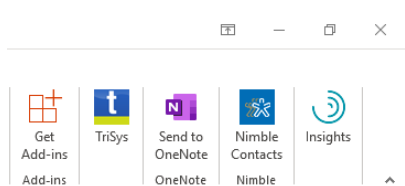
- View contact details directly within your mailbox
- Parse CV attachments from your mailbox
- Streamlined business development and contact management
- Streamlined client and candidate database management

- Faster and more informed decision-making, less mistakes and greater accuracy
- Running action workflows directly from within your mailbox
- Saving time and money on a daily basis, increasing your operational returns

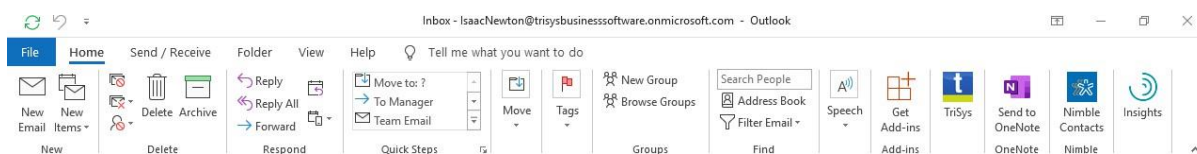
Add-In Installation Instructions (Standalone Installation only)

Note: when you install the add-in on either the Outlook Desktop or Outlook Browser version, the add-in will automatically become available in both applications (it is easier and faster to install the add-in using the desktop version of Outlook, however this document also contains instruction on doing so using the browser version of Outlook).

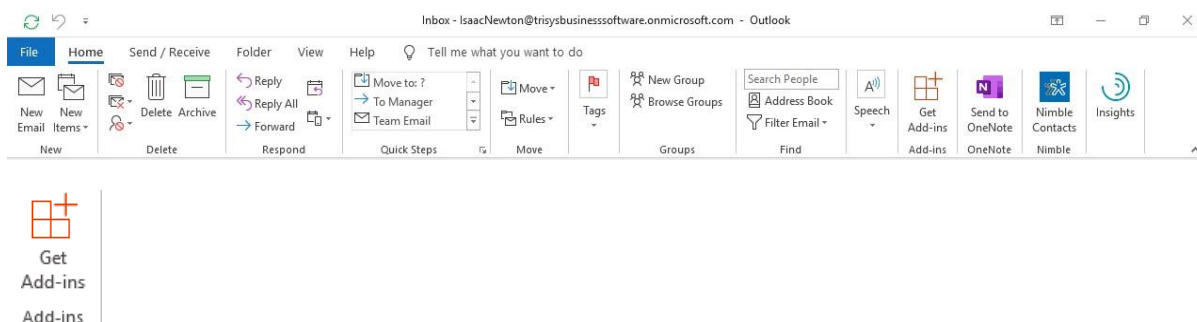
Below is a step by step guide to installing the add-in using the Outlook desktop application (the add-in will also automatically become available in the browser version of Outlook and vice versa, should you install the add-in using the browser version of Outlook)



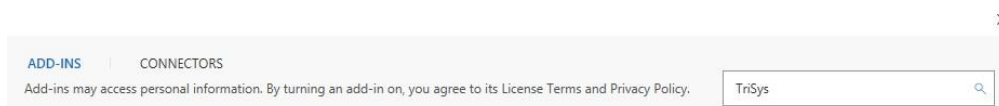
If your Outlook desktop application has the **“Get Add-Ins”** button showing as below (within the “Home” ribbon of Outlook) you can proceed, otherwise please contact your IT team as your Outlook version may be centrally managed and require centralized add-in deployment (or you may not be running the minimum required version of Microsoft Office compatible with the TriSys add-in as stated at the beginning of this document)



Click “Get Add-Ins” (this is a button showing under the “Home” ribbon of the latest Outlook version)

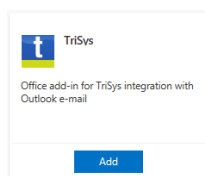


Search for “TriSys” as shown below.



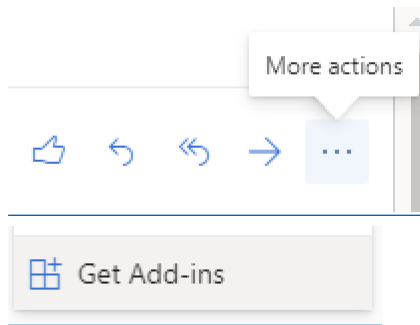
Note: if you do not see a page allowing you to search for add-ins and instead you see a browser page asking you to create an account and then see a message stating you do not have an Office365 account, this means you do not have an Office365 account and will need to consider the software prerequisites provided at the start of this document.

Click “Add”

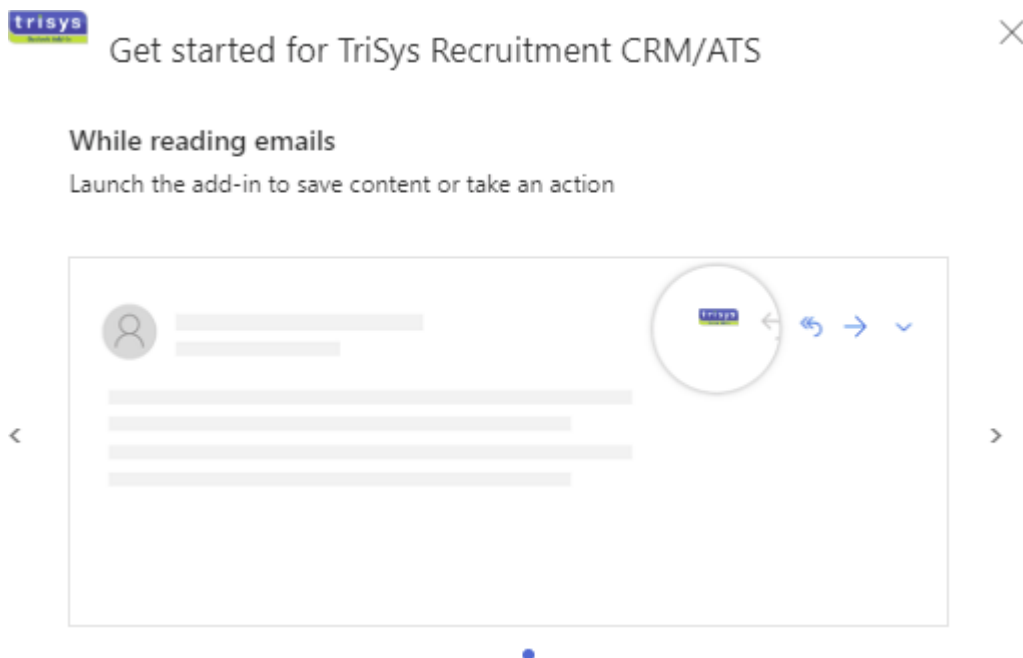


Should you wish to install the TriSys Add-In using the browser version of Outlook instead of the desktop version of Outlook, the process is slightly different (no need to do this if you have already installed the add-in via the Outlook desktop application as the add-in will automatically show in both).

- Login to your Outlook on the web browser application
This is normally at <https://outlook.office365.com>
- Click any e-mail message
- Click ... (as shown 'More Actions')
- Click 'Get Add-Ins'



- Search for 'TriSys'
- Click 'Add'
- You may now start using the TriSys add-in



- When reading an e-mail simply click the TriSys icon to show the TriSys CRM integration panel within your Office365 webmail window



Note: the add-in activation steps below are only required should the above steps not have successfully resulted in the add-in icon becoming visible in email messages

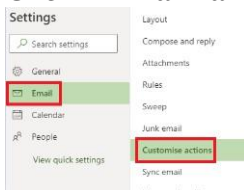
- Click the “Settings” (gears) icon at the top right of the window



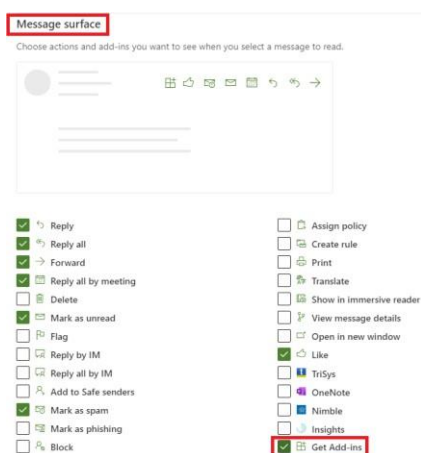
- At the bottom of the Settings panel, click “View all Outlook Settings”



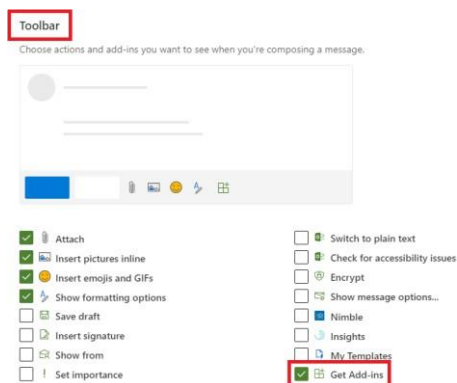
- Click “E-Mail” and then “Customise Actions”



- Under “Message Surface”:
 - Ensure the checkbox “Get Add-Ins” is checked



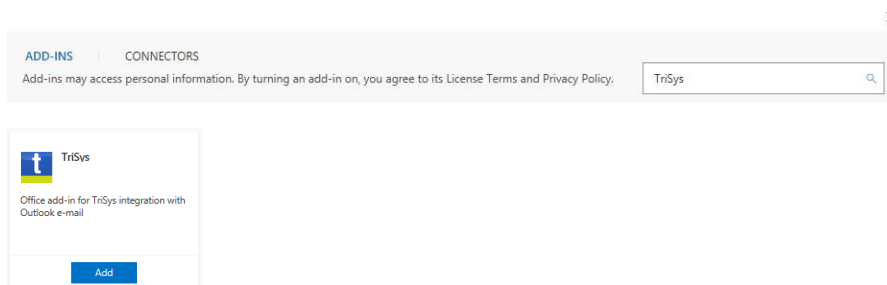
- Under “Toolbar”:
 - Ensure the checkbox “Get Add-Ins” is checked



- Click the “Save” button (at the top of the “Customise Actions” window)
- Close the window “Customise Actions” window
- Refresh your web browser (reload the page)
- Click an e-mail message
- Note (in the email reading pane) the “Get Add-ins” button is now available

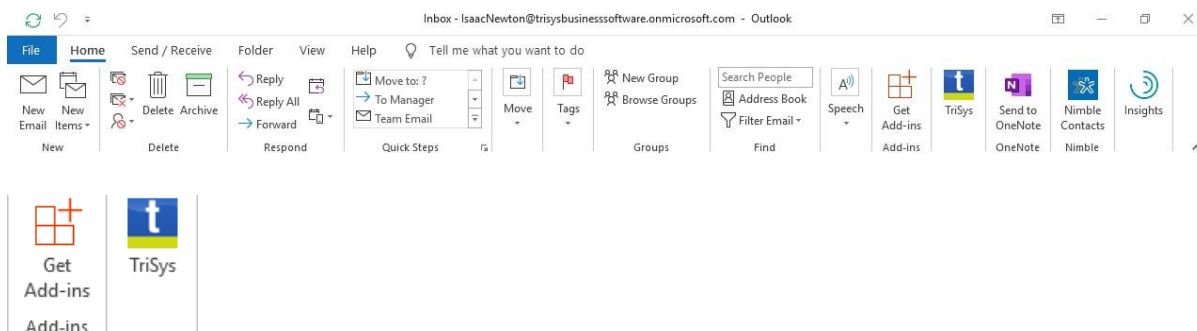


- Click the “Get Add-ins” button and search for “TriSys” and click “Add”



Toggling Add-In Visibility

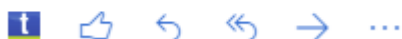
Once you have installed the add-in, you will see a “TriSys” icon inside Outlook:



Click the “TriSys” icon to show the add-in.

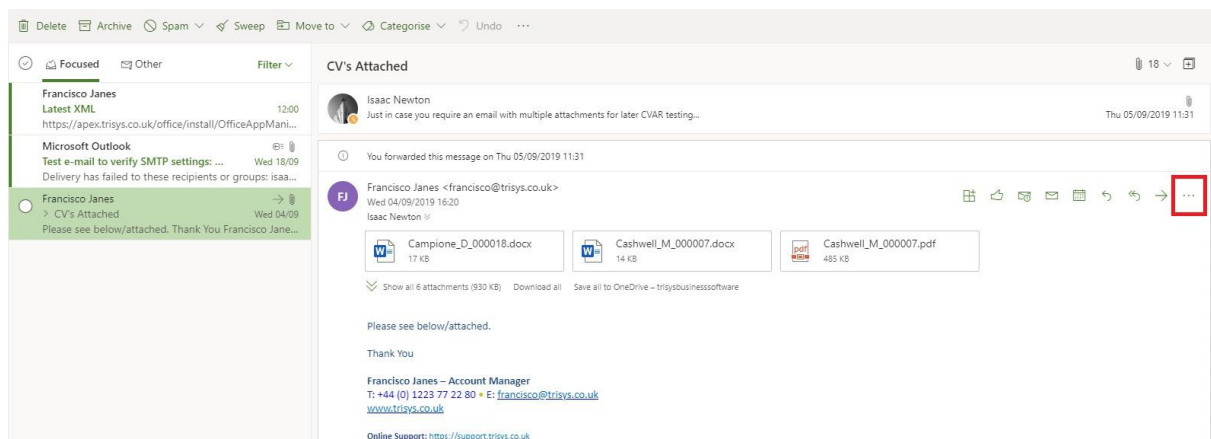
Note: in order to display the add-in when using the browser version of Outlook, the process is slightly different:

- Click once on any e-mail message
- Then click the ‘TriSys’ icon to reveal the TriSys integration window

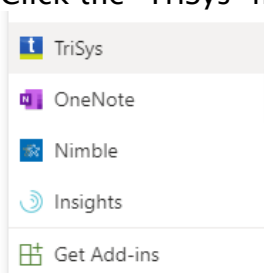


Note: the steps below show an alternative way to open the TriSys CRM integration window (not required should you be happy with the above approach)

- Click the “...” button at the top right of the e-mail reading pane:





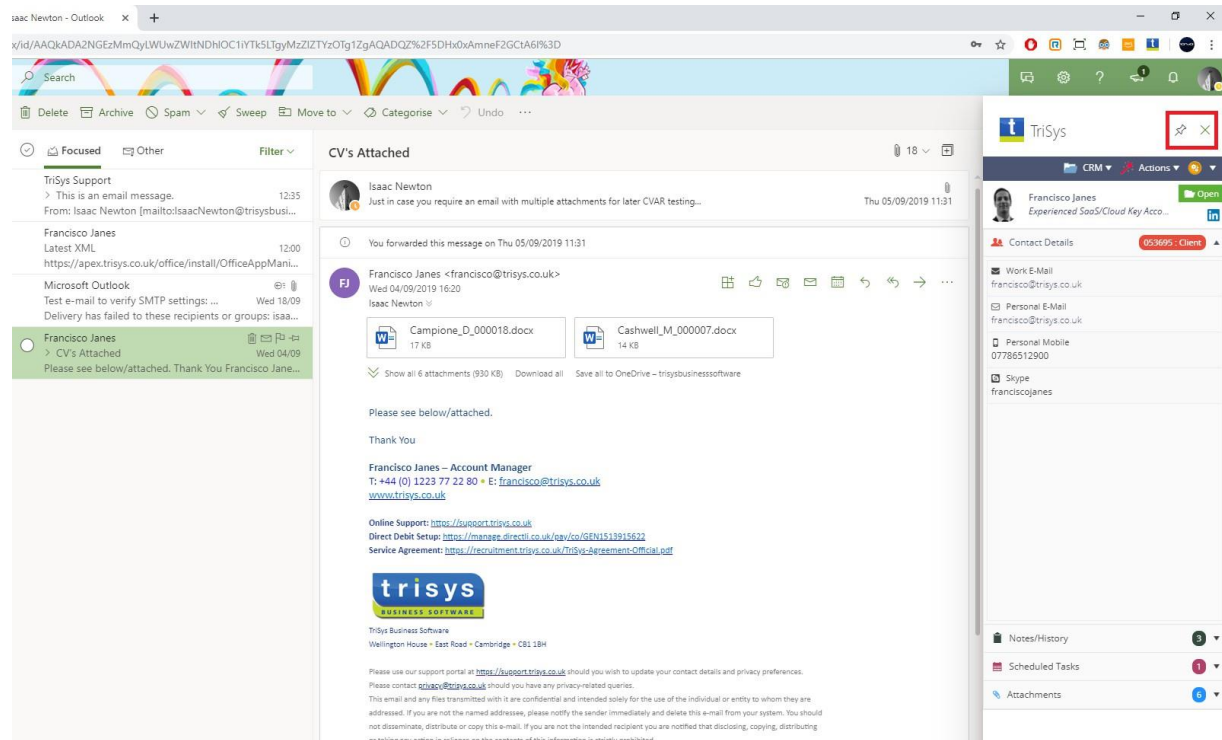
- Click the “TriSys” menu (this will enable the add-in area).



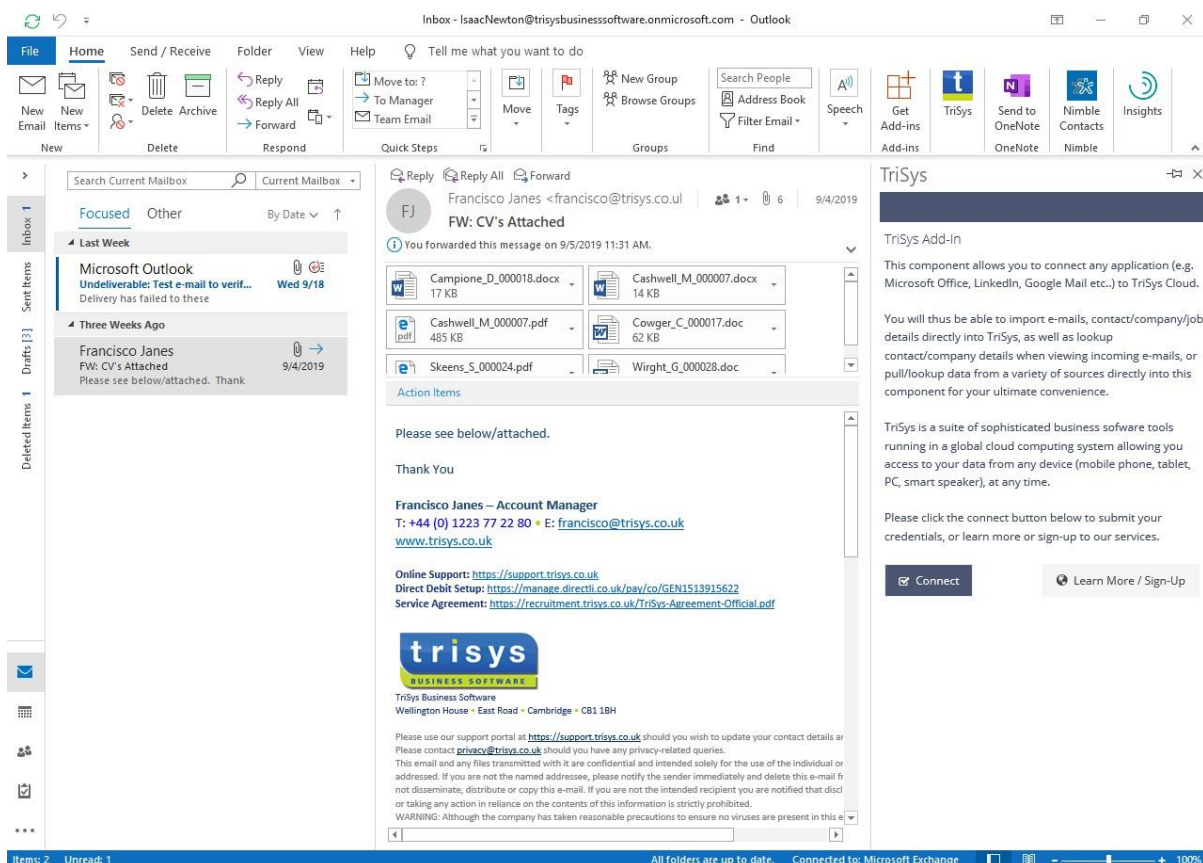
Note: if you do not see the “TriSys” menu as above, you have not yet installed the TriSys add-in and will need to do so first as per the section:


Add-In Installation Instructions (click to read).

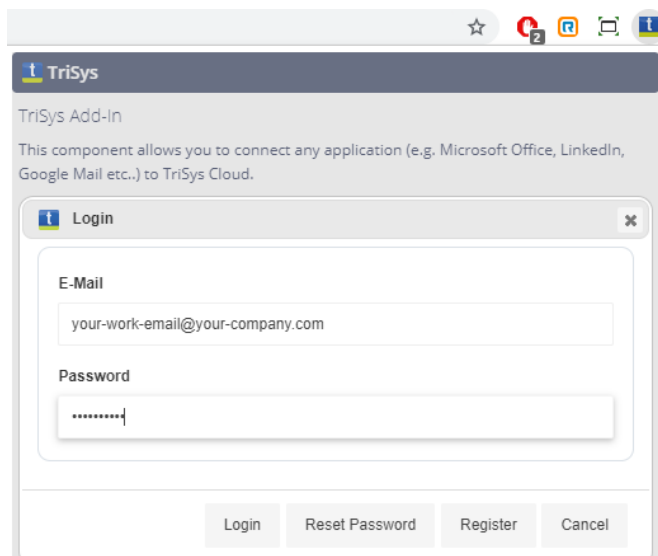
To “pin” the add-in window such that it always stays visible, click the  button once (this is located in the top right area of the add-in, just to the left of the  button which is used to hide the add-in).



If this is your first time using the add-in on the current computer, click “Connect”

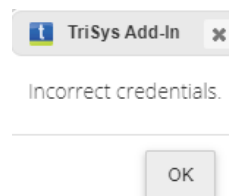



Once you click  you will need to authenticate using your existing Trisys username and password.



Should you see the message below, your username/password either does not match our records (you can at this point retry or click "Reset Password" or you are not meeting the Trisys add-in pre-requisites as outlined in the section:

Error! Reference source not found. (click to view).




Login

E-Mail

isaac.newton@opuslaboris.com

Password

.....

Login

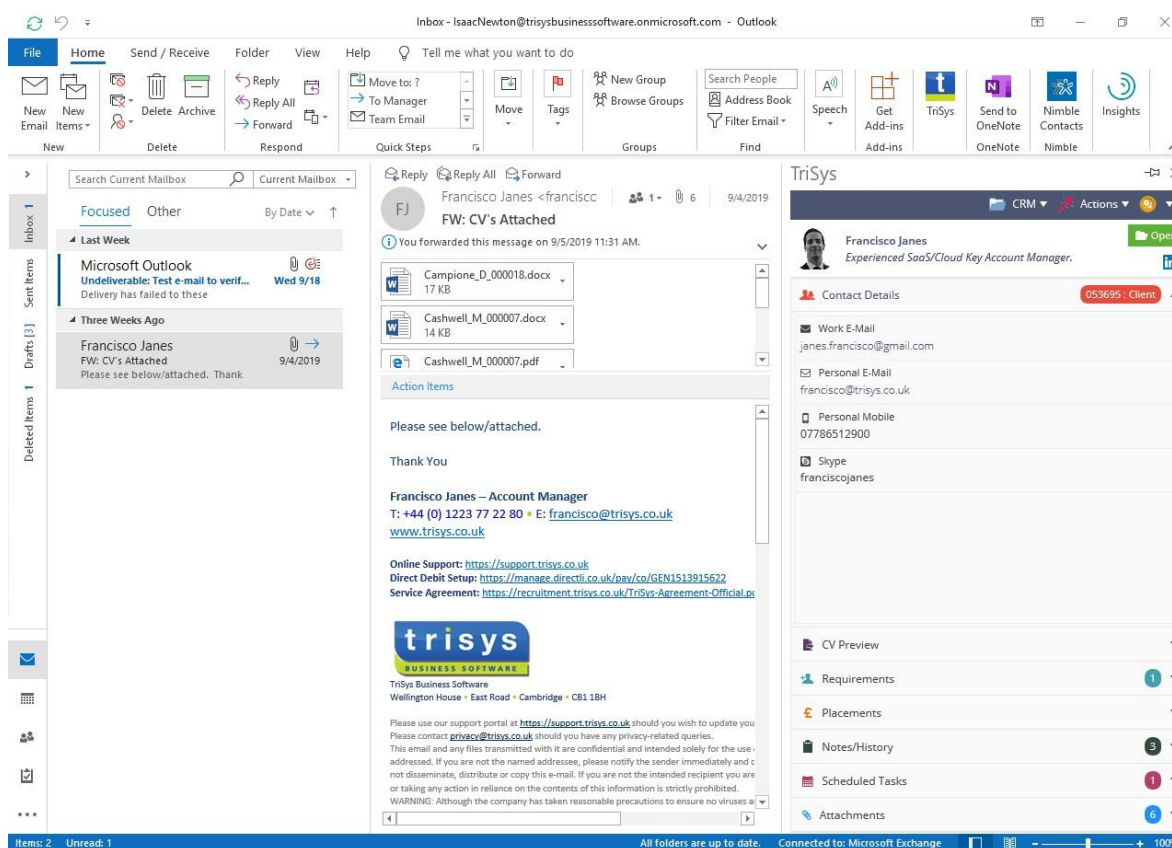
Reset Password

Register



Cancel

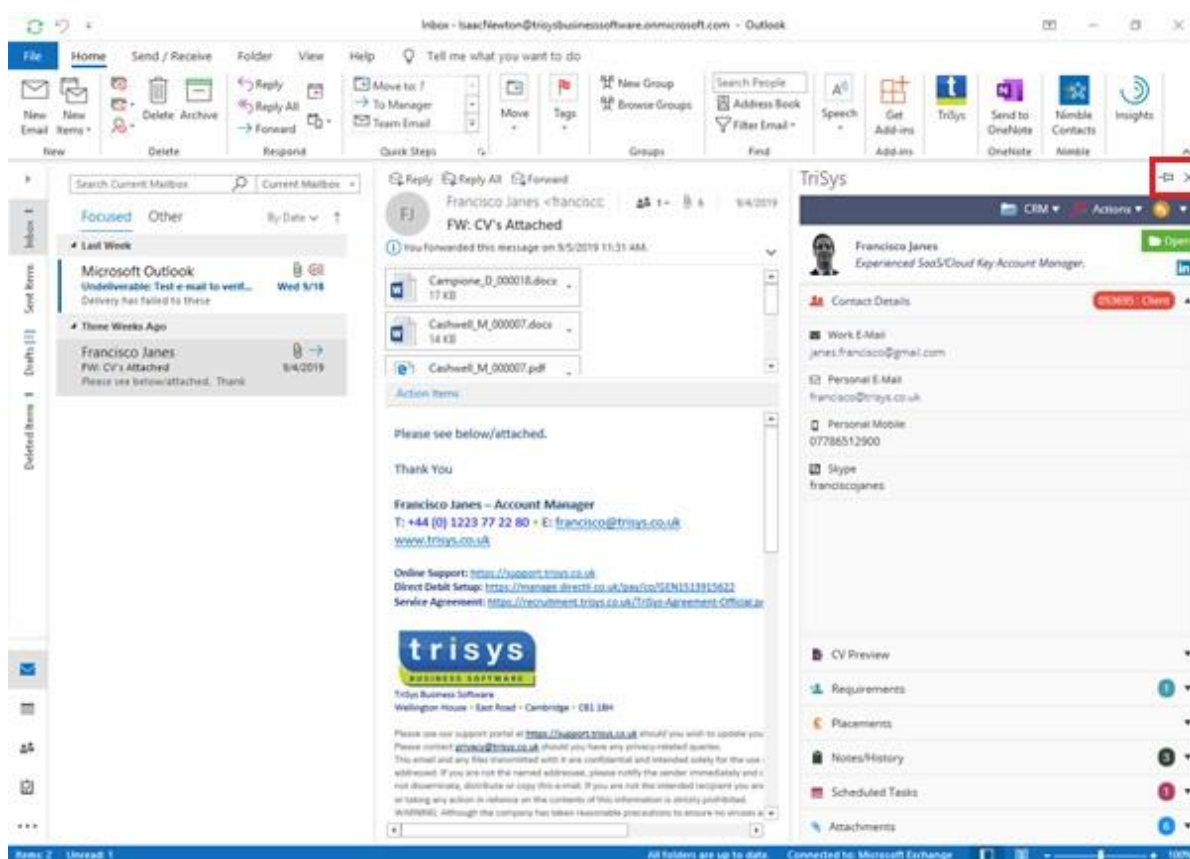
Once you have clicked “Login” you will see the add-in screen displayed as below.

You can also resize the add-in area by clicking and dragging the left hand side vertical border the add-in window region).



The screenshot shows the Outlook interface with the Trisys add-in. The add-in displays a contact profile for Francisco Janes, including his email, phone, and company information. The background shows an email thread with attachments.

To “pin” the add-in window such that it always stays visible, click the  button once (this is located in the top right area of the add-in, just to the left of the  button which is used to hide the add-in).



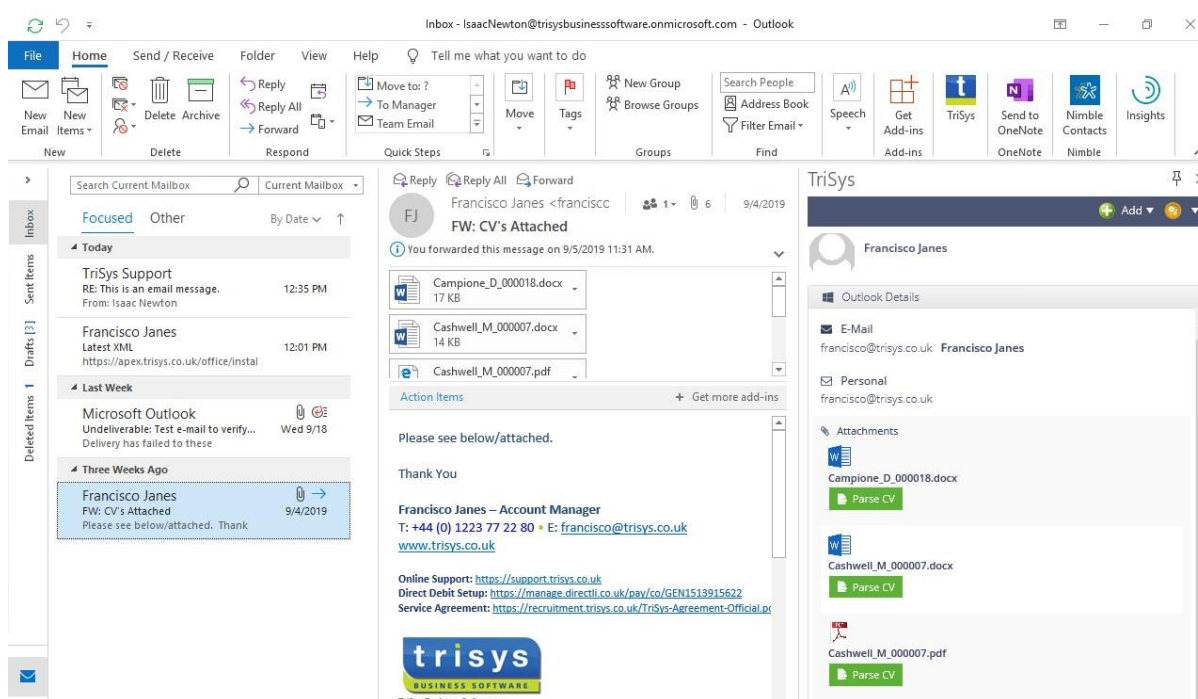
Note: should the add-in screen display with blank content as shown below, simply right click the blank area and click “Reload” once.

Adding a New Contact

When you click an e-mail message, the add-in will automatically communicate with your TriSys database.

If the email sender address is not yet in your TriSys database, you may add the new contact in one of two ways:

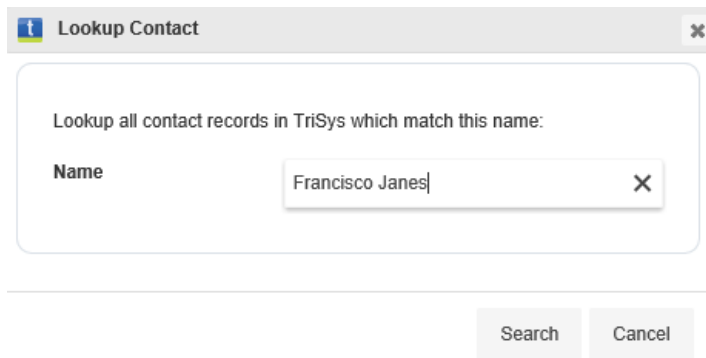
- Use the “Add > Add New Contact” menu (and then confirm the details of the new contact)
- Click the “Parse CV” button shown next to each detected CV attachment (and then proceed to either updating an existing contact from the newly arrived CV or add a new contact using the newly arrived CV)



Note: the TriSys add-in does not require that you have the TriSys CRM application running, however since the add-in is designed to work with TriSys, you are advised

to have either the TriSys desktop application and/or the TriSys Apex browser application running.

Should you believe there is already a contact in your TriSys database and wish to link the e-mail sender address to this contact, click “Add > Assign to Existing Contact” and then specify the name of the contact:



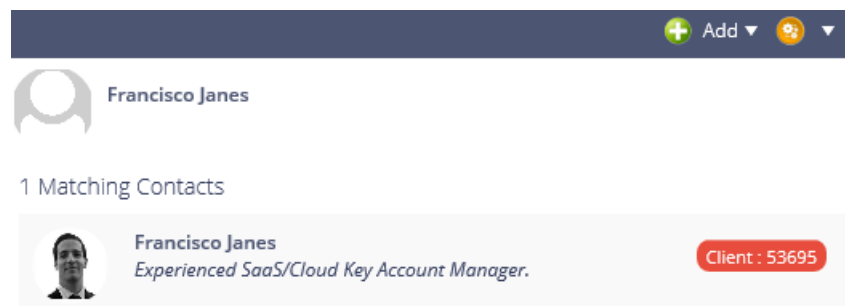
Lookup Contact

Lookup all contact records in TriSys which match this name:

Name

Search Cancel

Then, click “Search” and click the name of the matching contact (this will replace the e-mail address on record with the e-mail address contained in the “From:” field (for email messages un “Inbox” or other folders) or in the “To:” field (for e-mail messages in the “Sent” items)).



+ Add %

Francisco Janes

1 Matching Contacts

Francisco Janes
Experienced SaaS/Cloud Key Account Manager.

Client : 53695

At this point you can edit the contact details automatically detected in the e-mail message (on the left as shown below) before updating the TriSys contact (on the right as shown below).


You may also selectively update ☒ or not update ☐ a specific contact field in TriSys, therefore ensuring granular control over which fields are updated in TriSys.

TriSys

Francisco Janes

Assign to Existing Contact

Select which fields are to be copied from the public profile into the database record:

Outlook	Copy	TriSys
Public Profile URL	<input checked="" type="checkbox"/>	https://www.linkedin.com/in/fra..
Full Name	<input checked="" type="checkbox"/>	Francisco Janes
Photo	<input checked="" type="checkbox"/>	
Work E-Mail	<input checked="" type="checkbox"/>	janes.francisco@gmail.com
Personal E-Mail	<input checked="" type="checkbox"/>	francisco@trisys.co.uk

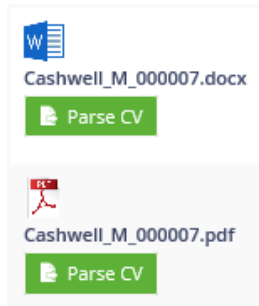
Update TriSys Cancel

Once you have edited any fields and selected to update/not update specific fields, click the button

Update TriSys

Parsing a CV/Resume

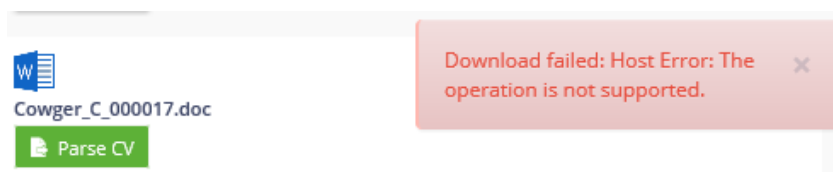
When you click an e-mail message, should there be any attachments these are shown in the “Attachments” area of the add-in:



Note: only attachments likely to be a CV document are shown.

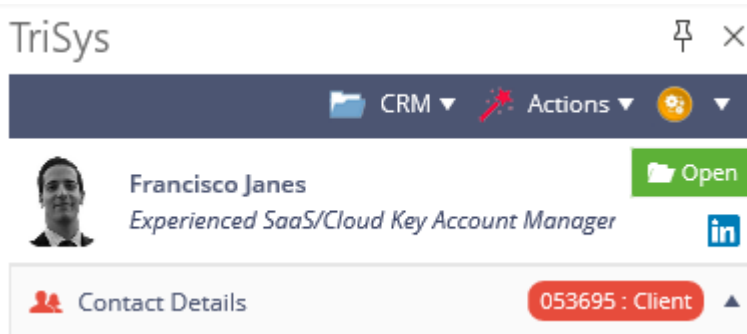
Clicking “Parse CV” will automatically import the corresponding CV into your TriSys “CV Auto Recognition / Incoming CV’s” area, which is where all CV’s available for parsing are queued at (therefore you can switch to the TriSys application you are using, where the CV will be ready for parsing, together with duplicate contact detection and selective update options readily available as usual).

Should you see the following message when clicking “Parse CV” this is due to Microsoft not yet having released an update for Microsoft Outlook which would allow the TriSys add-in to extract/download file attachments directly from within the Microsoft Outlook desktop application (Microsoft is working on this and will provide an update which will allow downloading attachments directly into your TriSys CV Parsing area).



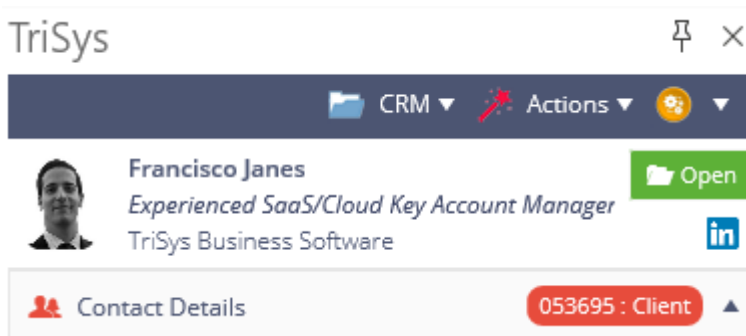
Open a Contact

Simply click the contact name or the “Open” button to open the full contact record directly in TriSys.



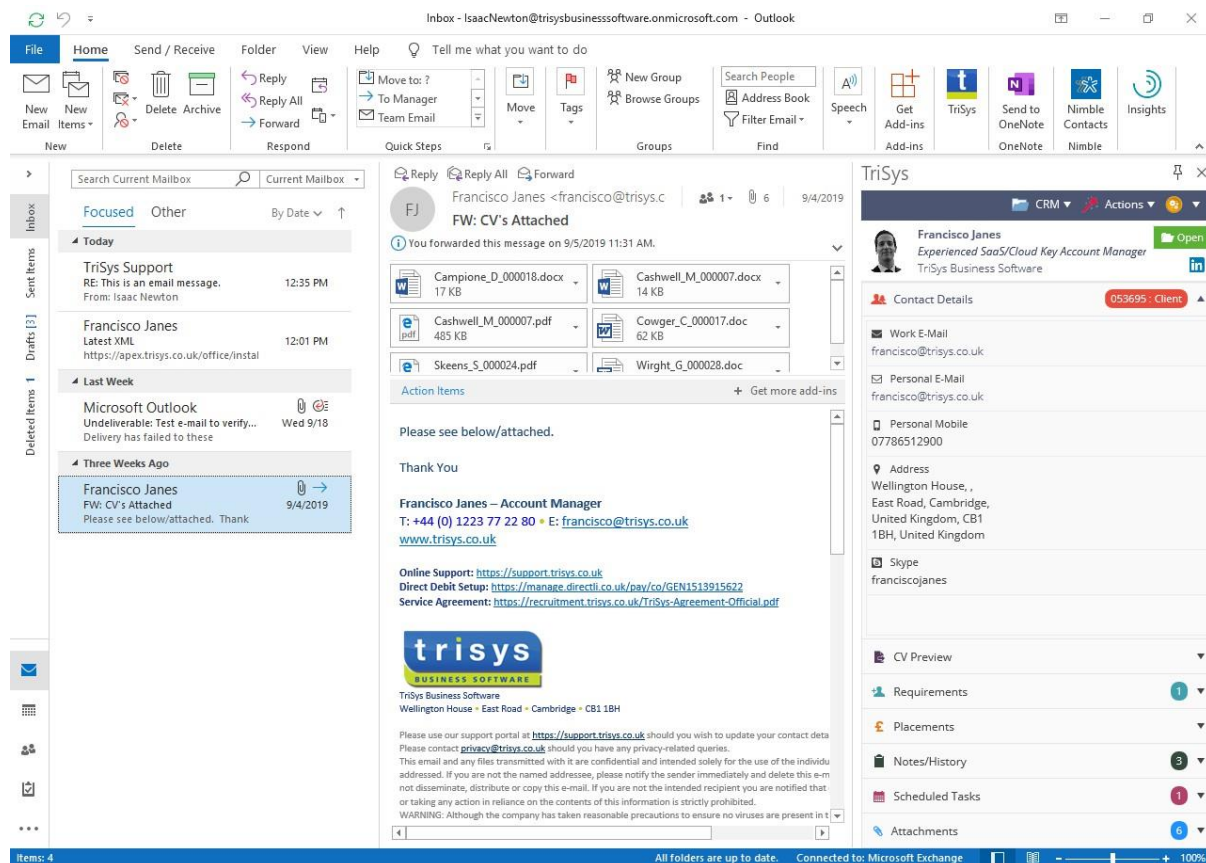
Open a Company

Simply click the company name located underneath the job title to open the full company record directly in TriSys.



Contact Summary Preview

When you click an e-mail message, if the contact exists in your TriSys database, a detailed preview is automatically loaded within the TriSys add-in, including contact details, CV Preview, Requirements, Placements, Notes/History, Scheduled Tasks and also any Attachments found in the e-mail message (only attachments likely to be a CV document are shown).



The screenshot displays the Outlook interface with the TriSys add-in. The main pane shows an email from Francisco Janes with the subject "FW: CV's Attached". The email body contains a "Thank You" message and contact information for Francisco Janes, including his title "Account Manager", phone number, email address, and website. The TriSys add-in is visible on the right side of the screen, showing a contact summary for Francisco Janes. The summary includes contact details, a CV preview, requirements, placements, notes/history, scheduled tasks, and attachments. The TriSys logo and business software information are also displayed at the bottom of the contact summary.

Running Actions

You can run actions against a contact directly from within your e-mail application, provided the contact exists in your TriSys database (if not, please see the section: **Adding a New Contact**). Please ensure TriSys is running and you are logged in, as this is required to run actions in tandem with the add-in.

