



### Contents

Deployment of Office Add-Ins (Individual VS Centralised)	2
Request Your TriSys API Key	4
Benefits of Using the TriSys Outlook Add-In	4
Add-In Installation Instructions (Standalone Installation only)	5
Toggling Add-In Visibility	9
Adding a New Contact	15
Parsing a CV/Resume	18
Open a Contact	19
Open a Company	19
Contact Summary Preview	20
Running Actions	21



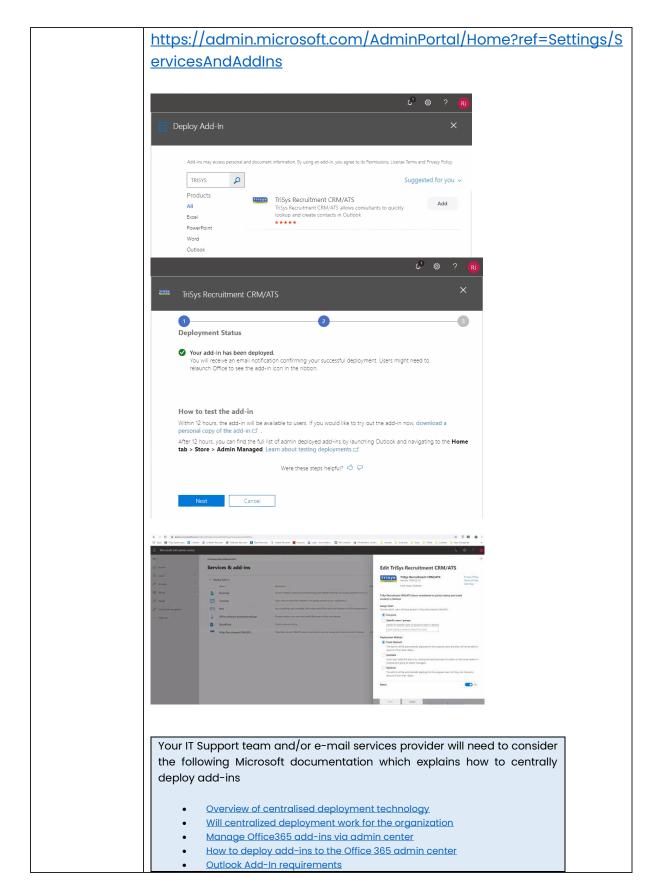
# Deployment of Office Add-Ins (Individual VS Centralised)

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

Deployment	Overview
Method	
Individual Deployment	Each user directly installs the Add-In
Deployment	Very important: you must ensure you are using the following         • 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:         • Microsoft Office365 Business 2016         • Microsoft Office Home and Business 2016         • 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         Vou are required to have a Microsoft Office365 account/subscription with the 'Exchange' service included         Once either of the above is confirmed, please proceed with reading this document.         • If the use of the use use of the use of the use of the use of the use of t
Centralised Deployment	Your IT support team centrally installs the Add-In This is often the case due to IT best practices i.e. centralized software deployment https://docs.microsoft.com/en- us/office365/admin/manage/manage-deployment-of-add- ins?view=o365-worldwide









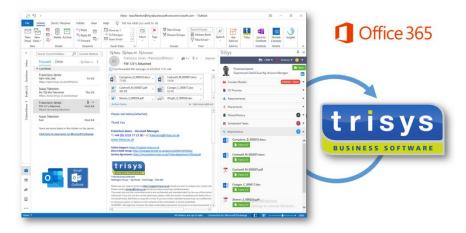


Requirements for running Office Add-ins     Browsers used by Office add-ins
Open the OBS admin center

#### 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 <a href="mailto:support@trisys.co.uk">support@trisys.co.uk</a> 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



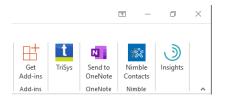


- Faster and more informed decision-making, less mistakes and greater accuracy
- Running action workflows directly from within your mailbox
- Saving time and money on a daily basis, increasing your operational returns

# 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)

<i>8</i> 9∓		Inbox - IsaacNewton@trisysbusinesssoftware.onmicrosoft.com - Outlook									<u></u> −	đ	$\times$	
File Hom	e Send / Receive	Folder View	Help 🛛 👰	Tell me what you	want to do									
New New Email Items •	Delete Archive	← Reply ← Reply All → Forward	<ul> <li>Move to: ?</li> <li>→ To Manage</li> <li>Manage</li> <li>Manage</li> </ul>	er 🖌 Man		發 New Group 쯋 Browse Groups	Search People Address Book Filter Email -	A <sup>(i)</sup> Speech	Get Add-ins	t TriSys	Send to OneNote	Nimble Contacts	) Insights	
New	Delete	Respond	Quick Ste	ps 🕞		Groups	Find		Add-ins		OneNote	Nimble		^

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





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File Home	Send / Receive	Folder View	Help 🔉 Tell	me what you want to	do								
New New Email Items •	© © ↓ Delete Archive	← Reply ← Reply All ← Forward	<ul> <li>Move to: ?</li> <li>→ To Manager</li> <li>Mean Email</li> </ul>	^ Move ▼ ▼ ▼ Rules ▼	Tags	쓙 New Group 於 Browse Groups	Search People Address Book Filter Email *	A <sup>(i)</sup> Speech	Get Add-ins	Send to OneNote	nimble Contacts	Insights	
New	Delete	Respond	Quick Steps	Ta Move		Groups	Find		Add-ins	OneNote	Nimble		^
Get Add-ins													
Add-ins													

#### Search for "TriSys" as shown below.

ADD-INS CONNECTORS	
Add-ins may access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy. TriSys	٩

**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 staying 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 <u>https://outlook.office365.com</u>
- Click any e-mail message
- Click ... (as shown 'More Actions')
- Click 'Get Add-Ins'





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

trisy	Get started for TriSys Recruitment CRM/ATS	×
	While reading emails Launch the add-in to save content or take an action	
<	8	>

• 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
   Image: Provide the setting of the s
- At the bottom of the Settings panel, click "View all Outlook Settings"
   View all Outlook settings S
- Click "E-Mail" and then "Customise Actions"



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

Message surface							
Choose actions and add-ins you v	vant to see	wher	n you	selec	t a me	ssage	e to read.
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C S Reply						_	Assign policy
✓ <sup>®</sup> Reply all ✓ → Forward							Create rule Print
Reply all by meeting							Translate
🗌 🖹 Delete					Ē	] 🕼	Show in immersive reader
🗸 🖾 Mark as unread						] %	View message details
P Flag							Open in new window
Reply by IM					~	1	Like
Reply all by IM							TriSys
Add to Safe senders						4	OneNote
🗸 🖾 Mark as spam							Nimble
Mark as phishing						3	Insights
Block					Ľ	B	Get Add-ins

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





Toolbar	
Choose actions and add-ins you want to see when you're comp	oosing a message.
II 📾 😑 🦩 🖽	
Attach	Switch to plain text
Insert pictures inline	Check for accessibilit
Insert emojis and GIFs	Encrypt
Show formatting options	🗌 🖙 Show message optio
Save draft	Nimble
□ 🛛 Insert signature	Insights
□ GR Show from	My Templates
Set importance	🗸 🗄 Get Add-ins

- 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

Get Add	ins						
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• Click the "Get Add-ins" button and search for "TriSys" and click "Add"

ADD-INS CONNECTORS Add-ins may access personal inform	nation. By turning an add-in on, you agree to its License Terms and Privacy Policy.	TriSys	۹
TriSys Office add-in for TriSys integration with Outlook e-mail			
Add			

# Toggling Add-In Visibility

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

89=			Inb	ox - IsaacNewton@ti	risysbusin	esssoftware.onmicrosof	t.com - Outlook					• –	٥	×
File Home	Send / Receive	Folder View	Help 🔉 Te	ll me what you wa	nt to do									
New New	Delete Archive	← Reply ← Reply All → Forward	→ To Manager	↑ ▼ Move	P Tags	양 New Group 영 Browse Groups	Search People	A <sup>())</sup> Speech	Get	TriSys	N Send to	1995 Nimble	Insights	
Email Items • New	Delete	→ Forward Respond	Quick Steps	·	-	Groups	Filter Email -	-	Add-ins Add-ins		OneNote OneNote	Contacts Nimble	-	~
	t													
Get	TriSys													
Add-ins														
Add-ins														

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Click the "TriSys" icon to show the add-in.

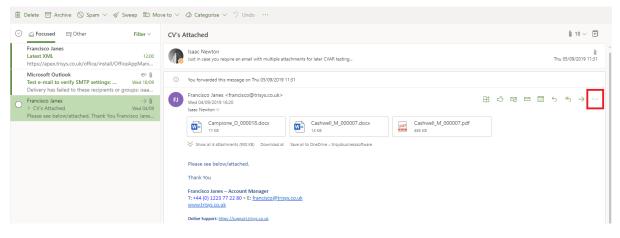
Note: in order to display the add-in when using the browser version of Outlook, the process is slightly different:

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

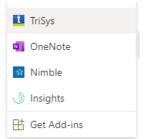


**Note:** the steps below show an alternative way to open the TriSys CRM integration window (not required should you be happy with the above approach)

• Click the "..." button at the top right of the e-mail reading pane:



• Click the "TriSys" menu (this will enable the add-in area).

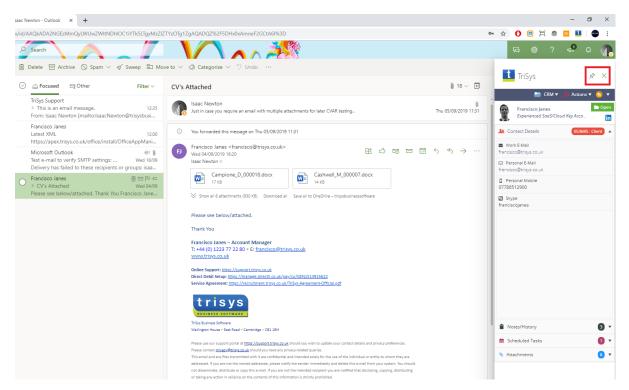


Note: if you do not see the "TriSys" menu as above, you have not yet installed the TriSys add-in and will need to do so first as per the section: <u>Add-In Installation Instructions</u> (click to read).





To "pin" the add-in window such that it always stays visible, click the  $\neg$  button once (this is located in the top right area of the add-in, just to the left of the  $\times$  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"





85 -	Inbox - IsaacNewton@trisysbusinesssoftware.onmicrosoft.com - Outlook 🛛 🗖 🚽 🖉
File Home Send / Receive Folder View	Help 🛛 Q Tell me what you want to do
New New Email Items - New Delete Archive New Delete Archive New Delete Respond	Image: Team Email       Team E
Search Current Mailbox Focused Other Last Week Microsoft Outlook Undeliverable: Test e mail to verif Delivery has failed to these Three Weeks Ago Francisco Janes FW Cy Attached Please see below/attached. Thank Francisco Janes FW Cy Attached Please see below/attached. Thank	Microsoft Provided this message on 9/5/2019 11:31 AM.         Image: Streem St
<ul> <li>➤</li> <li>≥5</li> <li>∴</li> <li>Rems: 2 Unread: 1</li> </ul>	The Subject Software         Will found House - E saft and - Combridge - C & 11 BH         Bease contact privacy/Efficienc out, should you wish to update your contact details an Efficience on the privacy efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related quark.         Bease contact privacy/Efficience out, should you have any privacy-related to at the information is strictly prohibited.         Bease contact privacy Bease contact of this information is strictly prohibited.         Bease contact privacy Bease content of the should privacy Bease content of t

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

☆ 🤁 🗹 🚺	Should you see the message below, your username/password
TriSys Add-In	either does not match our
This component allows you to connect any application (e.g. Microsoft Office, LinkedIn, Google Mail etc) to TriSys Cloud.	records (you can at this point
Login x	retry or click "Reset Password" or
	you are not meeting the TriSys
E-Mail	add-in pre-requisites as outlined
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Password	Error! Reference source not
	ound. (click to view).
Login Reset Password Register Cancel	TriSys Add-In 🔀
A	Incorrect credentials.
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1 Login	I		×	
E-Mail				
isaac.n	ewton@opuslaboris.c	om		
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).

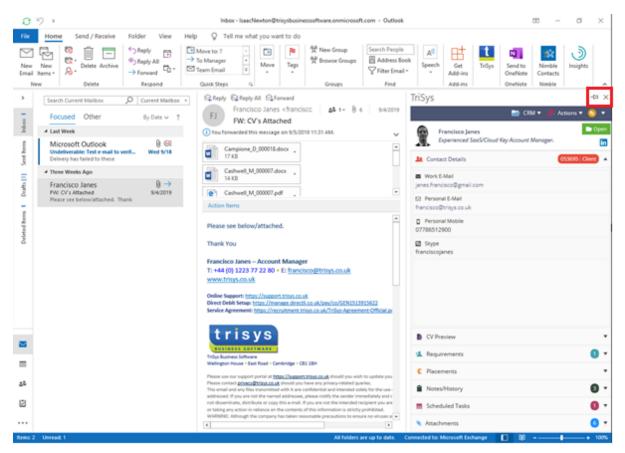
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File	Home Send / Receive Folder View Help	<ul> <li>Q Tell me what you want to do</li> </ul>	
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Sent Items	Microsoft Outlook 🛛 🕑 🕑 E Undeliverable: Test e-mail to verif Wed 9/18	Campione_D_000018.docx	Experienced SaaS/Cloud Key Account Manager.
Sent	Delivery has failed to these		Le Contact Details
23	▲ Three Weeks Ago Francisco Janes Ø →	Cashwell_M_000007.docx 14 KB	Work E-Mail
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-	Please see below/attached, mank	Action Items	francisco@trisys.co.uk
Deleted Items		Please see below/attached.	Personal Mobile 07786512900
Del		Thank You	Skype franciscojanes
		Francisco Janes – Account Manager T: +44 (0) 1223 77 22 80 • E: <u>francisco@trisys.co.uk</u> www.trisys.co.uk	
		Online Support: <u>https://support.trivys.co.uk</u> Direct Debit Setup: <u>https://manage.directii.co.uk/pav/co/GEN1513915622</u> Service Agreement: <u>https://recruitment.trisys.co.uk/Trisys-Agreement-Official.p</u> g	
		trisys	CV Preview
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		Wellington House + East Road + Cambridge + CB1 1BH Please use our support portal at https://support.trisys.co.uk should you wish to update you	£ Placements 🔹
<u> 2</u> 2		Please contact privacy@trisys.co.uk should you have any privacy-related queries. This email and any files transmitted with it are confidential and intended solely for the use	Notes/History
ý		addressed. If you are not the named addressee, please notify the sender immediately and c not disseminate, distribute or copy this e-mail. If you are not the intended recipient you are or taking any action in reliance on the contents of this information is strictly prohibited.	🛗 Scheduled Tasks 🚺 🔻
		WARNING: Although the company has taken reasonable precautions to ensure no viruses a v	Attachments     6 ▼
Items: 2	2 Unread: 1	All folders are up to date. C	ionnected to: Microsoft Exchange 🔲 💷 – — 🛶 🕇 100%

**TriSys Business Software Ltd** - Wellington House, East Road, Cambridge, CB1 1BH Telephone: +44 (0) 1223772280 | Email: <u>sales@trisys.co.uk</u> | Web: <u>www.trisys.co.uk</u> | Data Protection: <u>privacy@trisys.co.uk</u>



Get it from
Microsoft

To "pin" the add-in window such that it always stays visible, click the  $\rightarrow$  button once (this is located in the top right area of the add-in, just to the left of the  $\times$  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.

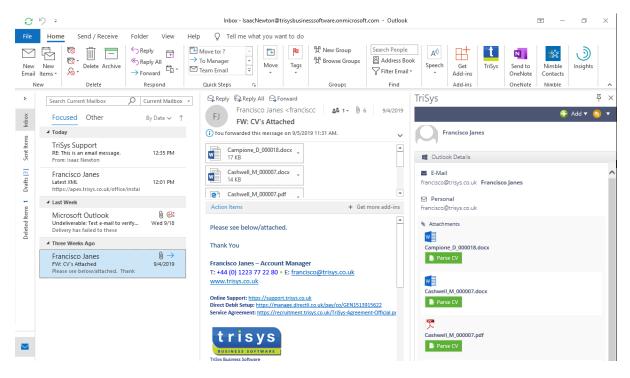


# Adding a New Contact

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 reco	rds in TriSys which match t	this name:	
Name	Francisco Janes		×

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 🔻 📀 🔻
C F	rancisco Janes	
1 Matching	g 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 C or not update a specific contact field in TriSys, therefore ensuring granular control over which fields are updated in TriSys.





TriSys	쭈	$\times$
🕀 Add 🔻	3	•
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     https://www.linkedin.com/in/f	ra	
tig Full Name		
Francisco Janes Francisco Janes		
Photo		
Work E-Mail		
francisco@trisys.co.uk janes.francisco@gmail.com		
Personal E-Mail		
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



Get it from	
Microsof	t

# 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:

Cashwell_M_000007.docx	
Parse CV	
Cashwell_M_000007.pdf	

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).

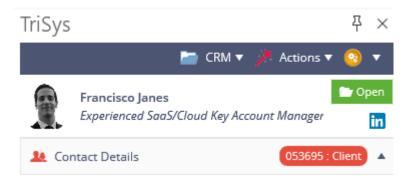






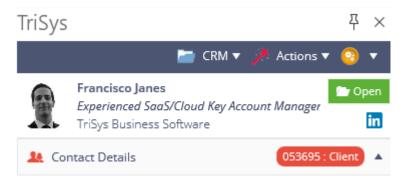
# Open a Contact

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).

Ð	9 <del>-</del>	Inbox - IsaacNewton@trisysbusinesssoftware.onmicrosoft.com - Outlook	• – • ×			
File	Home Send / Receive Folder View Help	Q Tell me what you want to do				
New Email	S Reply All →	To Manager Y Move Tags 路 Browse Groups 图 Address Book Speech Get TriSys S	Send to Nimble OneNote			
Ne	ew Delete Respond	Quick Steps Find Add-ins Or	DneNote Nimble 🔺			
>	Search Current Mailbox 👂 Current Mailbox 🔹	Q Reply Q Reply All Q Forward	꾸 ×			
Inbox	Focused Other By Date ∽ ↑	FJ Francisco Janes <francisco@trisys.c &="" -="" 0="" 1="" 2019<br="" 4="" 6="" 9="">FW: CV's Attached</francisco@trisys.c>	🛅 CRM 🔻 🏃 Actions 🔻 🧿 🔻			
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Sent Items	TriSys Support RE: This is an email message. 12:35 PM From: Isaac Newton	Campione_D_000018.docx Cashwell_M_000007.docx Cashwell_M_00007.docx Cashwell_M_	oftware in 053695 ; Client			
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2	▲ Last Week	Action Items + Get more add-ins francisco@trisys.co.uk				
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		Online Support: <a href="https://support.trisys.co.uk">https://support.trisys.co.uk</a> Direct Debit Setup: <a href="https://nanage.directli.co.uk/pay/co/GEN1513915622">https://nanage.directli.co.uk/pay/co/GEN1513915622</a> Service Agreement: <a href="https://recruitment.tripys.co.uk/Trisys-Agreement-Official.pdf">https://recruitment.tripys.co.uk/Trisys-Agreement-Official.pdf</a>				
		trisys	•			
_		TriSys Business Software 12 Requirements	<b>1</b> •			
		Wellington House + East Road + Cambridge + CB1 18H Please use our support portal at <u>https://support.trisys.co.uk</u> .should you wish to update your contact deta	•			
22		Please contact <u>privacy driver</u> <u>cout</u> should you have any privacy-related queries. This email and any files transmitted with it are confidential and intended solely for the use of the individu addressed. Hyou are not the named addresses, plases notify the sender immediately and delete this e-m	3 -			
Ż		not disseminate, distribute or copy this e-mail. If you are not the intended recipient you are notified that or taking any action in reliance on the contents of this information is strictly prohibited. WARNING: Although the company host taken reasonable precutions to ensure no viruses are present in t	0 -			
		WARNING: Atthough the company has taken reasonable precautions to ensure no viruses are present in t v	6 🔻			
items: 4		All folders are up to date. Connected to: Microsoft Exchange 📘	III			





# **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.

