



Outlook Add-In Manual



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Overview

The WebTMS for Outlook Add-In allows you to upload and attach emails to records in WebTMS from within Microsoft Outlook.

Obtaining the Outlook Add-In

1. Please confirm whether you have Outlook 2003, 2007, 2010, 2013 or newer. The easiest way to do this is by going to File > Help > About Outlook from within Outlook.
2. Please go to <https://email.webtms.com/> and follow the link to download the version of the WebTMS for Outlook Add-In that is compatible with your version of Outlook. Please also check on this site for any more up to date installation instructions.
3. Please uninstall the WebTMS for Outlook Add-In if you already have a previous version installed, by going to Start > Control Panel > Add Remove/Programs.

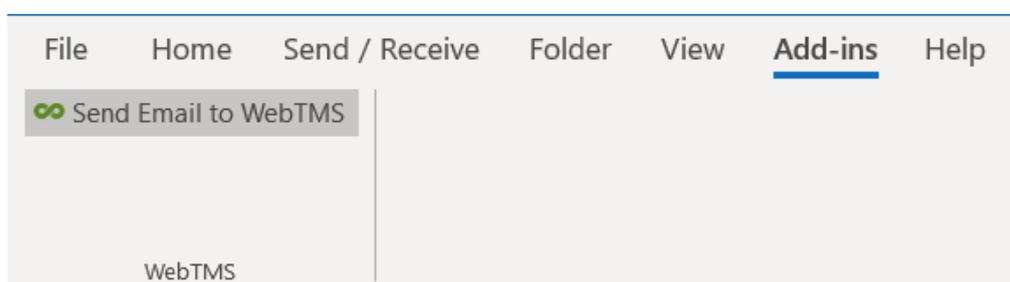
Installing the WebTMS for Outlook Add-In

1. Close Outlook if it is open.
2. Unzip the zip file you downloaded to your PC. It should contain two files. Setup.exe and WebTMSOutlookSetup.msi.
3. If this is the first time you have installed the WebTMS Outlook Add-In then please run Setup.exe first to install the Visual Studio Tools for Office runtime components.

The setup for WebTMSOutlookSetup.msi should then start automatically, otherwise please double-click on it to run.

NOTE: You will have to say yes/allowed to the various warnings that appear. This may require credentials from your IT Department

4. Once this is installed, start Outlook
5. When Outlook starts it should ask you to 'trust the add-in' and add a new button to the toolbar labelled "Send Email to WebTMS" Note: under later versions of Outlook, the button will appear on the "Add-Ins" tab.



Running the WebTMS for Outlook Add-In for the first time

1. Click the button 'Send Email to WebTMS' on the toolbar to open the WebTMS for Outlook Add In. If you have not previously installed an earlier version of the WebTMS for Outlook Add In, you will need to enter the settings for connecting to WebTMS before you can continue.

2. Enter the System Location. This is the URL you go to in order to access WebTMS (e.g. <https://www.tmssoftwaresolutions.com/tmwebervices>). If you are hosted or installed on your own servers, this may be a different url.
3. Enter your WebTMS user name and password. Please note: if you would like the Outlook Add-In to save your WebTMS password to its settings, so that you do not have to re-enter it the next time you use the program, check the 'Save' box.*
4. Optional: If you would like the Outlook Add-In to mark e-mails that have been uploaded to WebTMS with a particular category e.g. 'Sent to WebTMS', you can enter the name of the category.*
5. Next click "save settings" to save the configuration.

NOTE: If the system location is not a secure website i.e. the URL does not begin **https://**, information (including your username and password), will be sent over the Internet unencrypted. For security reasons it is strongly recommended that HTTPs is used when connecting to WebTMS.

6. Setup is now complete. Close the Add-In by clicking on the cross on the title bar of the Add In.

You can change the settings for the Outlook Add-In at any time by clicking on the "Change Settings" button.

**Outlook 2010/2013 only.*

Using the Outlook Add-In to Upload an Email to a Record in WebTMS

Note: *You do not need to be logged in to WebTMS to send email to WebTMS using the Outlook Add-In.*

1. Highlight the email(s) you wish to upload in Outlook. You can select more than one email by holding down the "Ctrl" key while you click on the emails to highlight them.
2. Click on the 'Send to WebTMS' button in the Add-In tab on the Outlook toolbar to open the WebTMS for Outlook Add In or click on the Outlook Add-In window if it is already open. NOTE: please take care not to open multiple copies of the Outlook Add-In.

3. When the WebTMS for Outlook Add In screen appears, the WebTMS record that you have most recently edited will be pre-selected. Confirm this is the record you'd like to attach the email(s) to. If it is not the correct record, click on the "Search WebTMS records" tab. This will display the search criteria fields allowing you to search for the record you want to upload the email to in WebTMS.
4. You can search for records using any of the fields below:

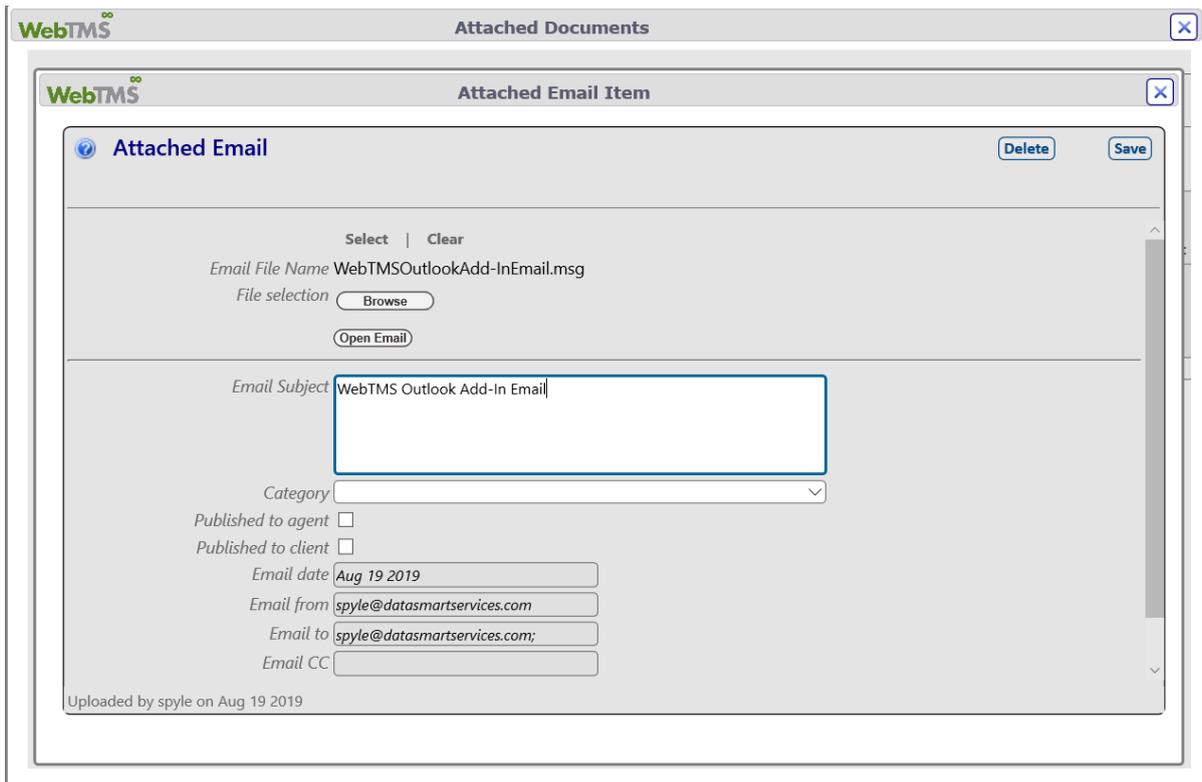
File Reference
Module
Owner
Other Party
Country
Record Reference
Trademark
Trademark Status
Application No
Registration No
Int. Class

NOTE: some fields are not applicable to all modules and may automatically restrict the search results to records in certain modules if filled in.

5. The WebTMS for Outlook Add In can display trademark images in the search results; however, this option is usually turned off to make searching faster. If you do need to see trademark images, check the option **Show Images on Hit List**. Please note: the search could take much longer to return results than usual.
6. Click on **Search Records** to run the search. Once the search has completed, the results will be displayed on the "Search Results" tab.
7. Once the records you'd like to attach the email to have been selected, press the "Send Email to WebTMS" button to begin the upload. A pop-up will appear to confirm that the email has been added to WebTMS once complete.
8. Check the box next to the records that you want to upload the email to, or click on the "Search WebTMS Records" tab to refine your search,

Viewing Uploaded Email

1. Uploaded emails will appear in the "Documents" tab at the top of the record, or at the bottom of the record below Actions if you have customized your view and have documents in "Open" or "Closed" view.
2. Open an email by clicking the  icon. Depending on your internet browser, you will be prompted to open or save the file. If you choose "Open", the email should open in your email program
3. If you would like to edit the document details associated with the email, you can do so by pressing the  icon.



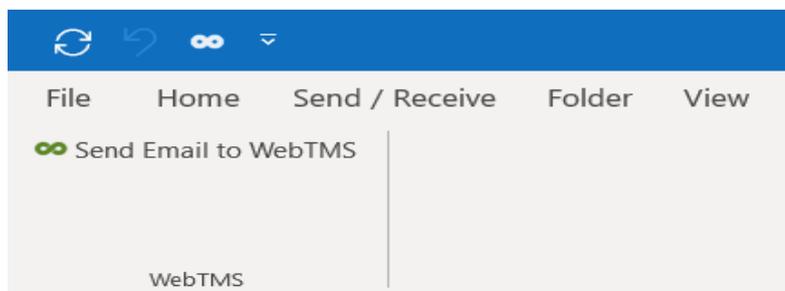
4. Click any column header to sort all attached documents by that category. For instance, clicking on “Email Date” will sort all emails by their receipt date.

Deleting Uploaded Emails from WebTMS.

1. Click on the **Documents** tab on the record
2. Click on the  next to the email you wish to delete.
3. Confirm you would like to delete the email by clicking “Delete” on the resulting pop-up

Tips & Tricks

1. To make the WebTMS Outlook Add-In more accessible, right click the “Send Email to WebTMS” button under the Add-ins tab in Outlook. Select “Add to Quick Access Toolbar” to display the icon in the top left corner of your outlook at all times



2. Right-click on any email, and the WebTMS Add-In should appear as an option on the resulting menu
3. You can optionally enter a description/subject for the uploaded email. By default, the subject of the email selected in Outlook will be used as the Description for the uploaded email in WebTMS; however, you can amend the description or specify your own description if you wish (Note: this option is not available when multiple emails are selected. The subject of the selected email will be used.).
4. You can also optionally select a Document Category for the uploaded email. By default, the Document Category will automatically be selected based on the folder in which the selected email resides in Outlook. If you wish, you can choose a different document category from the list (note: this option is not available when multiple emails are selected. The Document Category will be selected based on the Outlook folder).
5. If you would like the uploaded email to be visible to Client Access or to Agent Access users, check the “Publish to Client” or the “Publish to Agent” boxes. By default, uploaded emails are only visible to full users of the system.
6. If you hit the “Send Email to WebTMS” button in error, press the “Send Email to WebTMS” button again. You should now see the “Cancel Upload?”, click on it before the upload has been completed

7. If you're having trouble finding what record an email was uploaded to, you can search by title in Scanned Documents (under Configuration on the Dashboard).
 - a. Put the email subject (or the title you typed in when uploading) in the File Description search bar. Begin with an asterisk to catch all emails in the conversation regardless of if they begin with RE: or FW:
 - b. The “Edit” button will link you directly to the record to which the email is attached.

Search Results

1 record found

File Description	File Name	Document Category	Date Uploaded	Uploaded By	Module	File Reference	Owner	Owner Status	Country	Supervisor	Client	Client Reference
WebTMS Outlook Add-In Email	WebTMSOutlookAdd-InEmail.msg		19 Aug 2019	spyle	Trademarks	6766			Benelux	Andy Partridge		

1 record found