WebTMS Outlook Web Add-in

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1. Overview

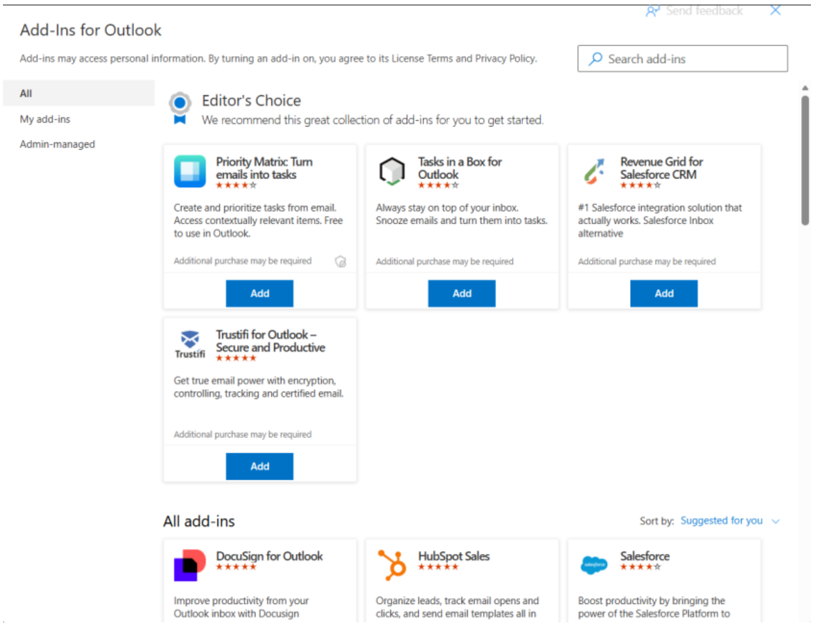
The WebTMS Outlook Web Add-in enables you to upload and attach emails to records in WebTMS directly from Outlook. You can also compose new emails by merging WebTMS records with your Email Merge templates, adding recipients, a merged email body, and attachments in one step.

2. Installing the Web Add-in for Users

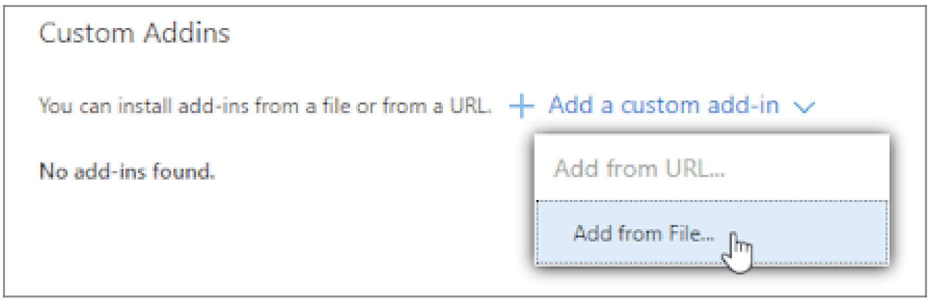
(1) Confirm your Outlook client supports Outlook JavaScript API requirement set 1.14 or later. This includes new Outlook for Windows, Outlook on the web, new Outlook for Mac, and classic Outlook on Windows from version 2404 (build 17530.15000) onwards — all with a Microsoft 365 subscription. It is not currently supported on classic Outlook for Mac, Outlook for Android or iOS, or on Outlook 2021 volume-licensed/LTSC installs.

(2) Download the manifest file from https://email.webtms.com/. Installed clients please email support@webtms.com for a separate version of the manifest.

(3) Go to https://aka.ms/olksideload. This will open New Outlook in your web browser and open the 'Add-Ins for Outlook' pop up window. If it does not then ensure your browser is fully updated.



(4) Click 'My add-ins' and scroll down to 'Custom Addins'. Click 'Add a custom add-in' then 'Add from File'.



(5) Select the manifest file you downloaded, then select **Install**. This will install the add-in on all instances of New Outlook on your computer. If you cannot install an add-in yourself, you may need to ask your IT team to make the add-in available for you.

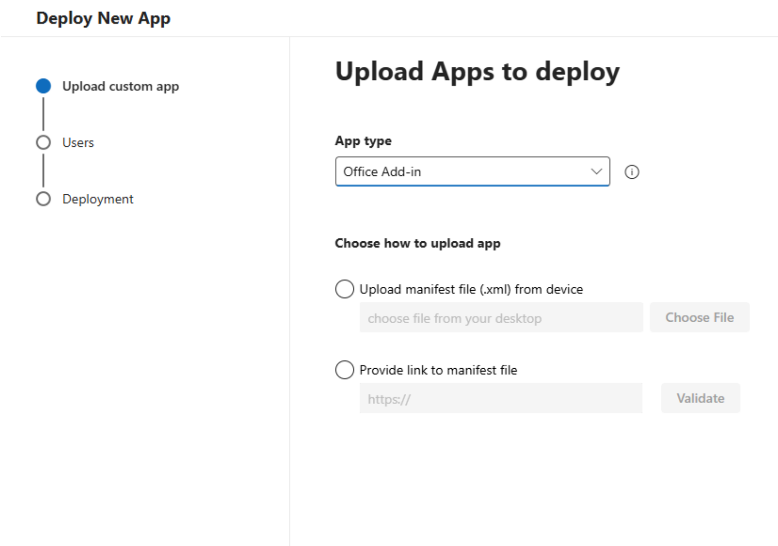
(6) You may need to fully restart Outlook to see the add-in.

3. Installing the Web Add-in for Outlook Admins

(1) Open the Microsoft 365 Admin Centre by signing in at https://admin.microsoft.com/ with your Global Admin or Exchange Admin account.

(2) Navigate to Integrated Apps by going Settings -> Integrated Apps then click **Upload custom apps**.

(3) Select Office Add-in as the app type, then either download the manifest file from https://email.webtms.com/ and upload it from your computer or enter the link https://email.webtms.com/OutlookWebAddIn/WebTMSOutlookWebAddInManifest.xml. Installed clients please email support@webtms.com for a separate version of the manifest.

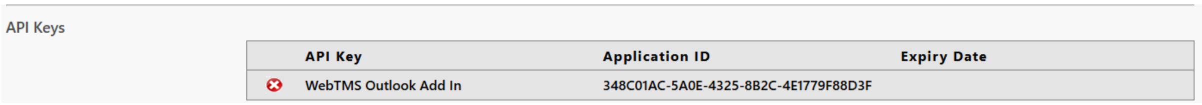


(4) Choose who to deploy to, this may be specific users, groups or everyone. Click **Next** to complete the deployment wizard.

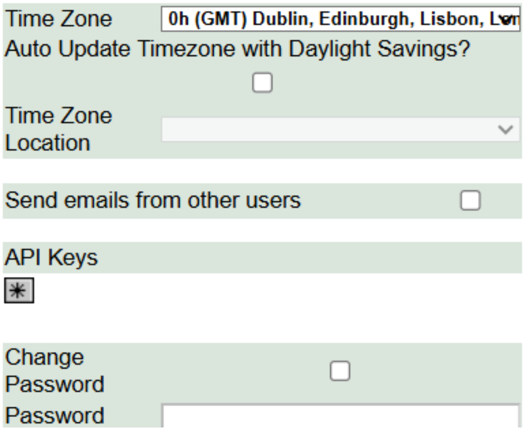
(5) The add-in should appear in Outlook for assigned users within 24 hours.

4. Using the Web Add-in

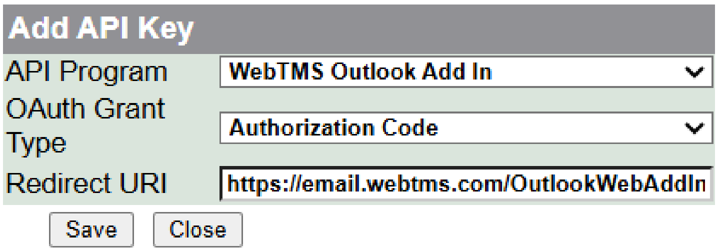
(1) Ensure that you have an API Key for the Outlook Add-in in My Profile in WebTMS. If you do then skip to step 5.



(2) If there is no entry for the Outlook Add-in here, ask an administrator to generate a key for you. They can do this by going to the user in the Security Wizard and scrolling down to 'API Keys', then selecting the * button to generate a new key.

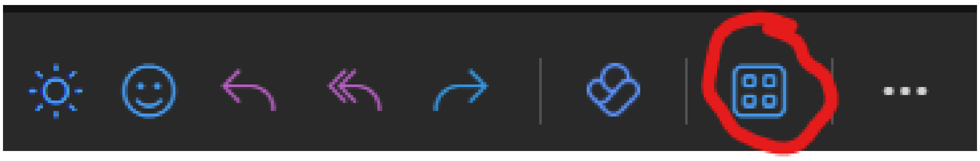


(3) In the pop up window, select 'WebTMS Outlook Add-in' as the API Program and 'Authorization Code' as the OAuth Grant Type. In the 'Redirect URI' field, put the URL https://email.webtms.com/OutlookWebAddIn/loginDialog.html.

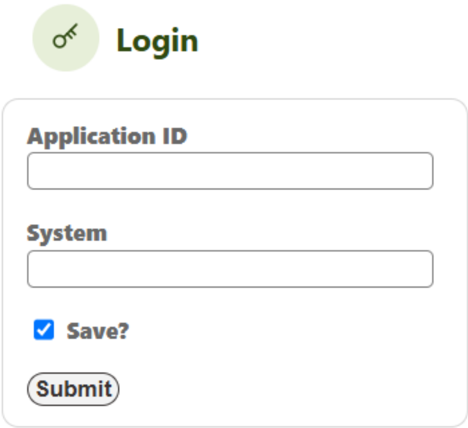


(4) **Save** to generate the key. Users can delete keys themselves from 'My Profile', and administrator users can delete other users' keys in Security.

(5) Open an email in your inbox, or begin composing one, then click on the Add-in button.



(6) Click on 'WebTMS Outlook Add-in' from the list of installed add-ins. This opens a taskpane on the right-hand side of the screen. The first screen you will see is the Login screen, where you will need to enter your Application ID and System path.



(3) Your System path is the URL to your WebTMS system. You can find it by going to the WebTMS main menu, then selecting the URL up to the Pages part. For example, if your main menu URL is https://www.tmsoftwaresolutions.com/TMWebServices/Pages/Main/MainMenu.aspx, then your System path would be https://www.tmsoftwaresolutions.com/TMWebServices/. Your Application ID can be found in 'My Profile' under 'API Keys'.

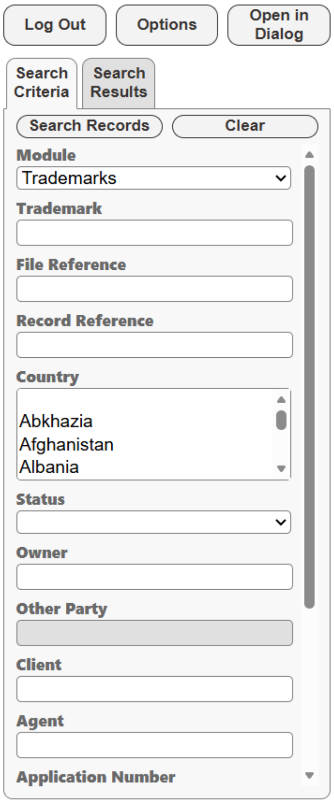
(7) Once you have entered the System path and Application ID, check the 'Save?' box to save the details, then click **Submit** to start the login process.

(8) You will be prompted to display a new window; click **Allow**.

(9) This opens the WebTMS login page in a new window. Log in with your normal WebTMS login details. Once this is completed, you will usually be logged in automatically in future. If you would prefer to enter your login details each time, uncheck the 'Save?' tick box.

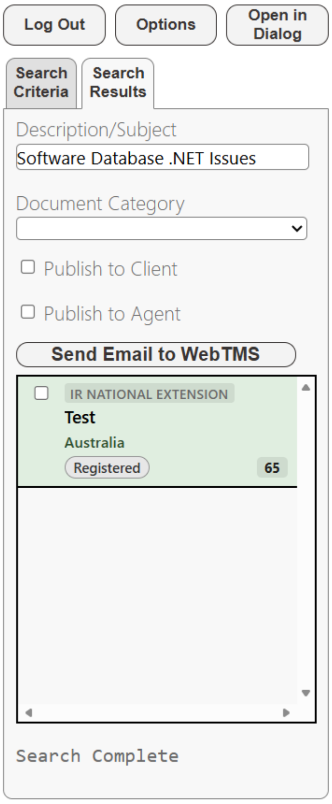
5. Searching in the Web Add-in

By default on login the add-in will search for your last opened record in WebTMS. To do your own search, click on the 'Search Criteria' tab.

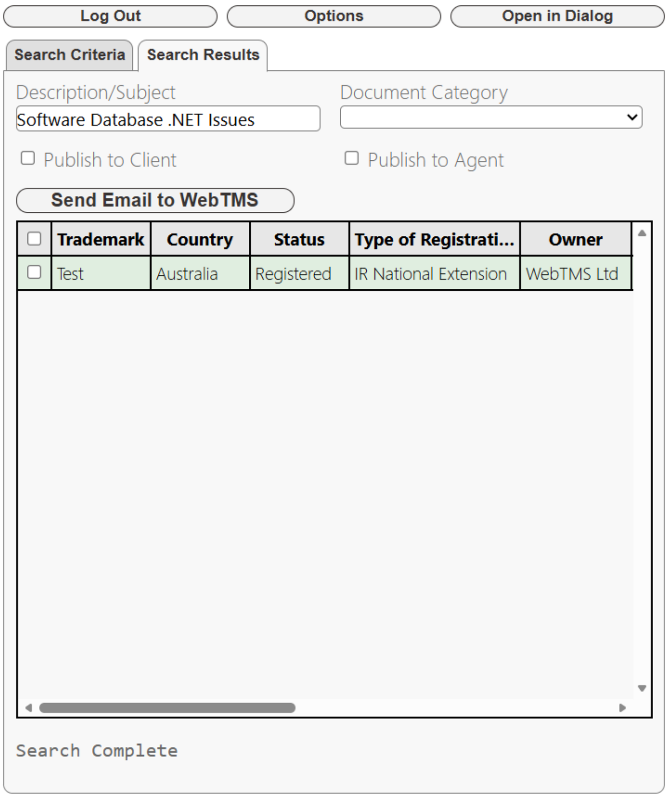


The various search filters will change and be enabled/disabled based on the module you have selected. Scroll down to see more filters. The search filters work the same as they do in WebTMS. When you click on 'Search Records' you will be automatically moved to the 'Search Results' tab.

6. Search Results in the Web Add-in



At the default taskpane width a compact table will be displayed that shows basic data about the record. For Trademarks this is Type of Registration, Trademark, Country, Status and File Reference. You can change to a normal table by increasing the width of the taskpane.



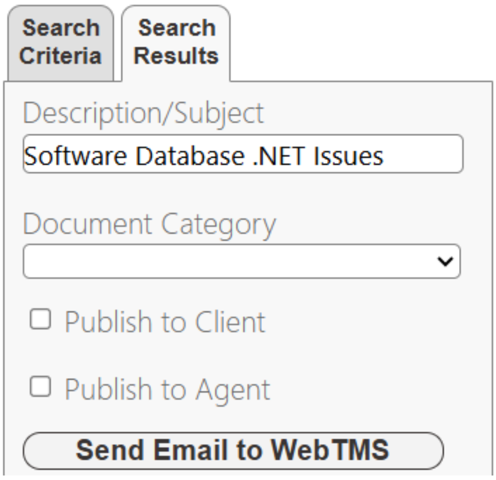
You can change the width of a column in the large table by dragging the line next to the header, or double click it to increase the size to the biggest cell. You can sort the rows by clicking the column header.

Below is a list of the fields used for the compact table by module. File Reference can be swapped for Record Reference in Options:

Module	Fields shown
Companies	Type of Entity, Company, Country, Company No., File Reference
Trademarks	Type of Registration, Trademark, Country, Status, File Reference
Contracts	Type of Contract, Matter, Primary Country, Status, File Reference
Disputes	Type of Dispute, IP Rights in Dispute, Country, Status, File Reference
Searches	Type of Search, Trademark, Countries (condensed to first country + "+N"), Status, File Reference
Assignments	Type of Transfer, Matter, Country, Status, File Reference
Cross Module	Module, Trademark/Matter, Country, Status, File Reference
Case Management	File Type, Matter, Country, Status, File Reference
Patents	Type of Patent, Patent Title, Country, Status, File Reference
Domain Names	Domain Name, Country, Status, File Reference
Registered Designs	Type of Design, Short Title, Country, Status, File Reference
Customs Recordation	Recordation Type, Matter, Country of Recordation, Status, File Reference
Copyrights	Type of Work, Title of Work, Country, Status, File Reference

7. Uploading an Email to WebTMS

When you open the add-in while reading an email you can upload that email to records in WebTMS. On the 'Search Results' tab are options for the uploaded email.



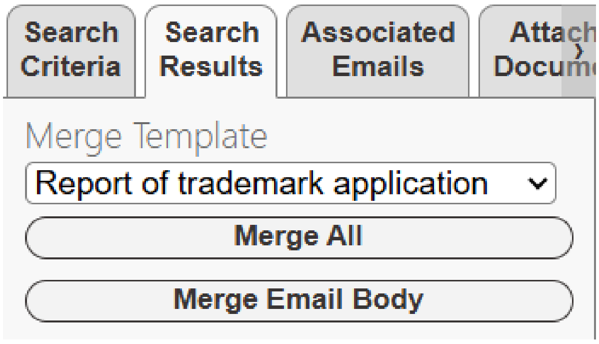
'Description/Subject' will be filled by the email's subject; the rest of the options determine how the fields will be filled in WebTMS. Select the records you wish to upload to in the Search Results and click **Send Email to WebTMS** to upload the email to all of the selected records.

You can also send multiple emails to WebTMS at once by selecting multiple emails. In this case, the 'Description/Subject' field will be disabled and the subject of each email will be used. All of the emails will be uploaded to all of the selected records. Please note that this is only available if your Outlook client supports Outlook JavaScript API requirement set 1.15 or later.

If you pin the add-in, you can open various emails while it stays open, and the email(s) to be uploaded will change as you move between them.

8. Merging an Email

When you open the add-in while composing an email, either new or as a reply, you will have the option to use your existing Email Merge templates to add data to the email. First, select the record you wish to merge. This will fill the 'Merge Template' drop-down with all available templates for that record's module.



You can then select **Merge Email Body** to merge the record with the subject and body of the template. This will be inserted wherever your cursor currently is.

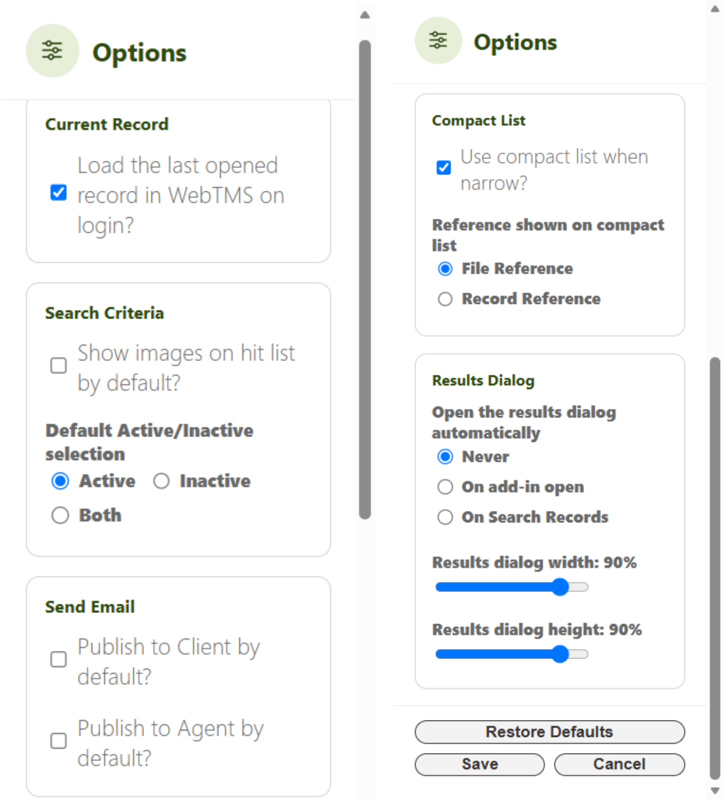
Selecting a record will also fill the 'Associated Emails' and 'Attached Documents' tabs. 'Associated Emails' contains any emails connected to the record, from Attorneys or Contacts. You can select whether to put each email in To, CC or BCC and click **Merge Recipients** to add the emails to those fields. 'Attached Documents' contains all of the documents attached to the record. Selected documents will be added to the email as attachments when you click **Merge Attachments**. You can also merge everything at once by clicking **Merge All** on any of the tabs.

9. Open in Dialog

Click on the **Open in Dialog** button at any time to open a pop-up window containing all of the tabs; you will need to click **Allow** on a prompt. The pop-up window can be bigger than the taskpane and so can show more information at once. Any searches or selections made will be reflected in the window, and any changes made will be reflected in the taskpane when the window is closed.

10. Options

Click on the **Options** button to open the Options page; this contains various options to change how the add-in works.



Below is an explanation of each option:

Current Record. Controls whether or not to open the Search Results tab with your most recent WebTMS record. If the last thing you did in the add-in was upload an email, it will also contain all records you uploaded to. If unchecked, you will load to the Search Query tab.

Search Criteria. Choose the default option for fields on the Search Query tab.

Send Email. Choose the default option for the tick boxes when uploading an email to WebTMS.

Compact List. Controls whether or not the compact results table is used when the taskpane/dialog is narrow. You can also choose to use Record Reference over File Reference in the bottom right of each result.

Results Dialog. Allows the pop-up window to be opened by default at various points; you will still need to click Allow on the prompt. You can also choose the default height and width of the pop-up window; this is done as a percentage of screen size.