

WinSearch and Outlook




Overview

Integration between WinSearch and Outlook offers the following benefits:


- Ability to process resumes directly from Outlook
- Add email attachments to existing WinSearch records
- Import WinSearch people into Outlook Contacts
- Export Outlook contacts into WinSearch
- Synchronize Contacts and Calendar Appointments
- Quick look-up of WinSearch records by email address
- Create WinSearch activities on the fly from Outlook emails
- Track emails sent to and received from known recipients
- Colored flags for categorizing emails

Please Note: For these features to work you must be connected to your WinSearch database. If the toolbar is not available, then these features are not available either!


Resume Processing

- There are three options for resume processing from Outlook:
 -  **Create a new person's record** from the current email attachments.
 -  Create new person's records from **selected text** in the email message.
 -  Create new person's records from all emails (that have attachments) in a **selected folder**.

Processing an Email Attachment


1. Click the email with the attachment in Outlook.
2. Click the **Process Email** toolbar button ().
3. Respond to any prompts for processing the resume.

Processing Selected Text


1. Highlight the text containing the resume making sure that the candidate's name is in the first line of the selection.
2. Click the **Process Selected Text toolbar** button ().

3. Respond to any prompts for processing the resume.


Processing a Selected Folder

1. Select the folder or an item in the folder.
2. Click the **Process All Email(s) in Selected Folders** toolbar button ().
3. Select **OK** to the prompt for the initial values assigned to the new people.
4. Select **Yes** to process subfolders or **No** to skip folders from the prompt for whether to process subfolders, if necessary.




Adding Attachments to Existing Records

- Using the paper clip icon , you have the ability to add an email attachment(s) to an existing Person or Company record in WinSearch.
- Unlike Resume Processing, the attachment does NOT need to be a Word document.
- Options to process document for key words and create the person's WSResume.


Adding Email Attachments to Existing Records

1. Click on the email with the attachment in Outlook.
2. Click the **Add Attachments to Existing DB Record** toolbar button ().
3. Enter the person's or company's name and select **Lookup**. Please Note: For Persons, start with **Last Name** first.
4. Click the appropriate person or company.
5. Modify the **Document Description** entry if needed. The final document description can also parenthetically include the document's filename.
6. Choose whether to add the document to WSResume and process it for key words.
7. Choose whether the document becomes the primary document.
8. Choose **Add Document**. If the current email represents a new person, click **Create New Person** instead to add a new person with the current document(s).
9. Respond to any prompts for processing the resume.


Importing/Exporting Contacts & Calendar Synchronization

- Import, Export and Synchronization settings are granted on a user by user basis by SYSADM by going to **Settings → User Administration**.
- The three different features are listed below:
 -  **Import a WinSearch** person to make Outlook contact records.
 -  **Export Outlook contacts** to create WinSearch persons records.
 -  **Synchronize** changes between people & contacts as well as update Outlook and WinSearch calendars.


To export an Outlook contact to a WinSearch person:

1. Highlight the contact(s) that you wish to bring into WinSearch.
2. Click the **Export Contacts To Database** toolbar button ().
3. Choose **OK** to the confirmation prompt.

To import a WinSearch person as an Outlook contact:



1. Click the **Import Contacts From Database** toolbar button ().
2. Enter the person's name to add and click Lookup.
3. Highlight that person(s)/saved list from the list and choose OK.

To synchronize data between calendars and WinSearch persons/Outlook contacts:



4. Click the **Synchronize Contacts and/or Appointments With WinSearch Database** toolbar button ().

WinSearch Lookup Features

There are two WinSearch lookup options in Outlook:


-  **Lookup a person** by the email's To, CC or From address or linked contact.
-  **Lookup all persons** from an email address's domain (the part after the "@" character).

Find a person in WinSearch using their Email in Outlook:


1. Click on the email or contact.
2. Click **Lookup by Sender's Email Address** toolbar button () .
3. Click **Lookup Selected User by Domain** toolbar button () if you would rather see all records containing email addresses at the same domain (i.e. @gmail.com).

Creating Activities from Outlook

There are two ways to create activities from emails in Outlook:

-  **Create a WinSearch activity** out of the highlighted Outlook email or contact.
- Automatic Email Logging

Creating an Activity from an email (or contact):

1. Click on the email (or contact).
2. Click **Create Activity for Selected Item(s)** toolbar button () .
3. An activity window will pop up. If creating from an email, all email text will be contained within the notes field. Hit Save & Close on the activity window to create.


Automatic Email Logging

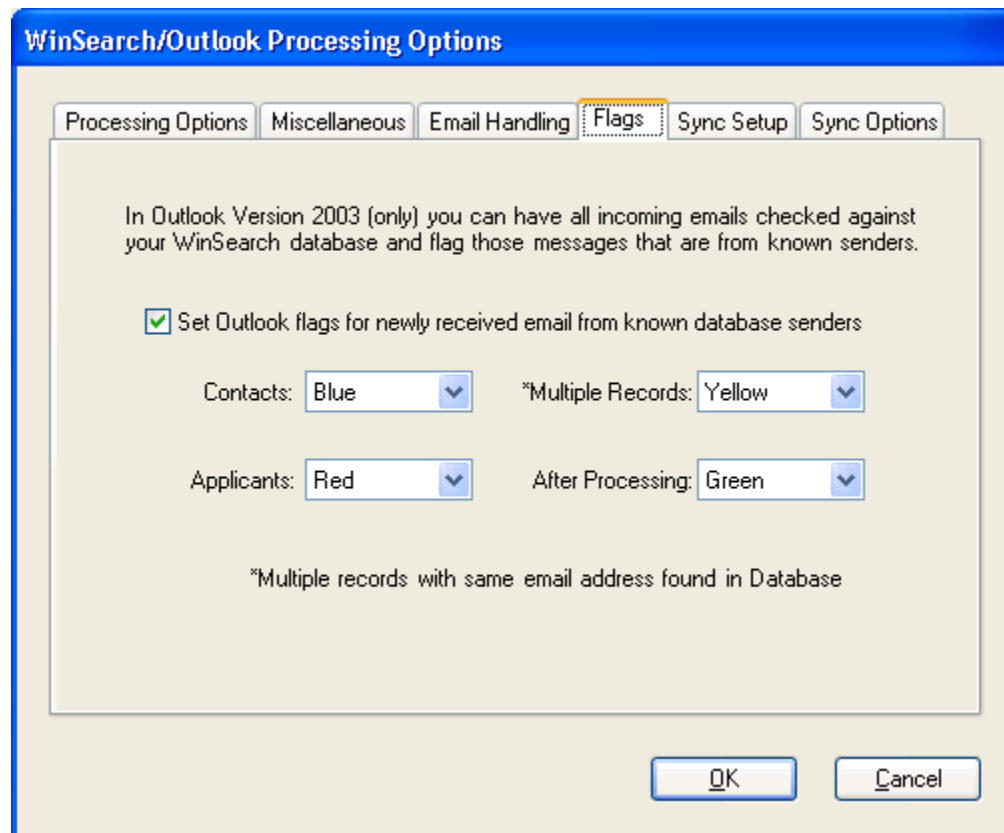
- Automatic email logging can be turned on for the three following options:
 - Email Sent from WinSearch
 - Email Sent from Outlook
 - Email Received in Outlook
- When email logging is turned on, all emails that are sent or received (based upon your settings) will be logged automatically in WinSearch provided the email address is captured in the WinSearch Record.
- Automatic email logging is set up by the SYSADM user by accessing the following menus in WinSearch: **Settings → SysAdm Options → Automatic Activity Logging.**

Flags

- Flags are assigned to incoming emails for the following reasons:
 - Indicate that the email address is recognized in the database
 - Categorize the email sender as Candidate or Contact
 - Indicate potential duplicate records
 - Show that an email has been processed
- There are four flag categories available:
 - Contacts: Blue by Default
 - Applicants: Red by Default
 - Multiple Records: Yellow by Default*
 - After Processing: Green by Default

*If an email received has a Yellow flag, based upon default colors, that means there are at least two records in the database with that email address; a good indicator of duplicates.

- Flag colors can be altered or turned off by selecting the **Processing Options**  icon on the WinSearch toolbar in Outlook and clicking on the **Flags** tab.

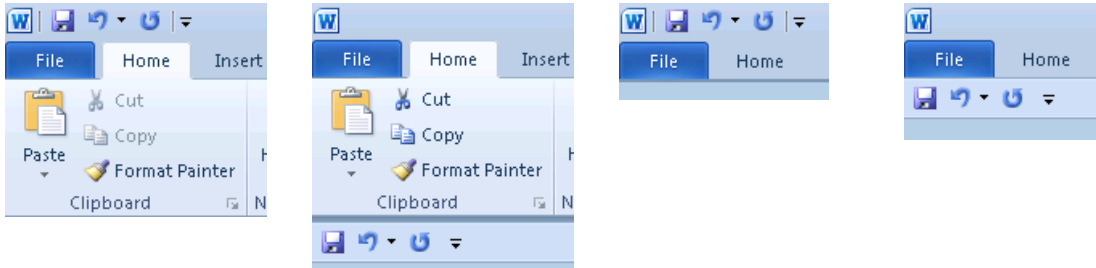


Adding WinSearch's Toolbar to the Word/Outlook Quick Access Bar

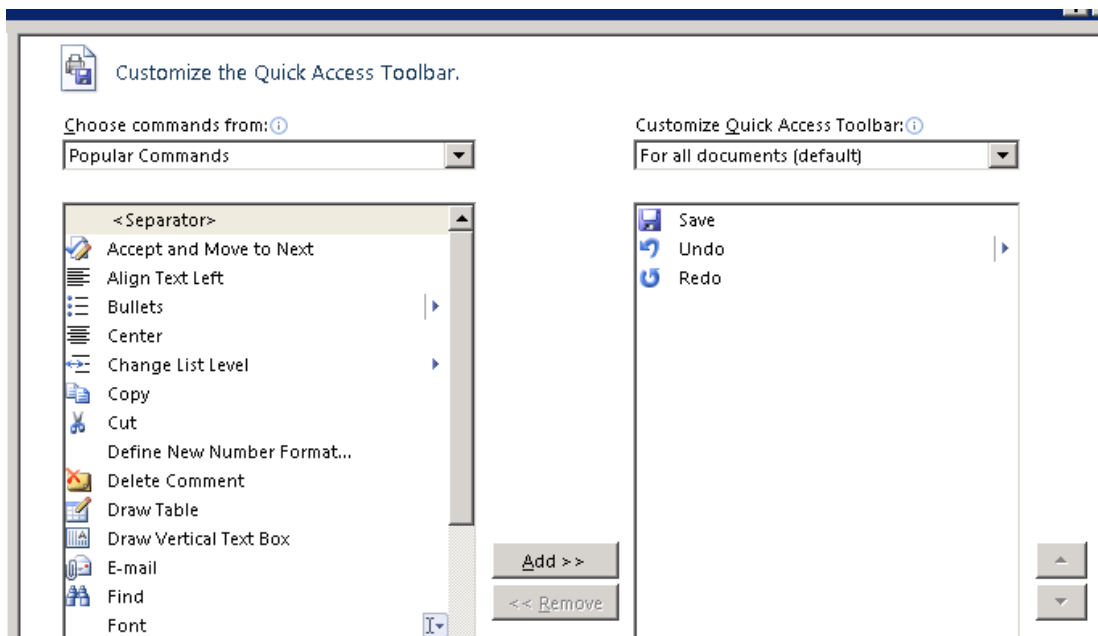
While the WinSearch toolbar cannot be added to the Home ribbon in Outlook or Word, you can add it to the Quick Access bar which is the collection of icons on its own little bar.

To do this for Office 2010's Word or Outlook:

1. Click on the ▼ arrow at the end of the Quick Access bar. The Quick Access bar may be above or below the ribbon and/or menu bar so it may have an appearance like any one of these.



2. Choose More Commands from the popup menu to display the window for adjusting the Quick Access Toolbar



3. Choose Add-Ins Tab from the Choose Commands From drop-down list.
4. Highlight Custom Toolbars in the list and click the Add >> button to move it to the right.
5. Choose OK.