Outlook Plug-in Quick Guide

Getting you up to speed quickly.

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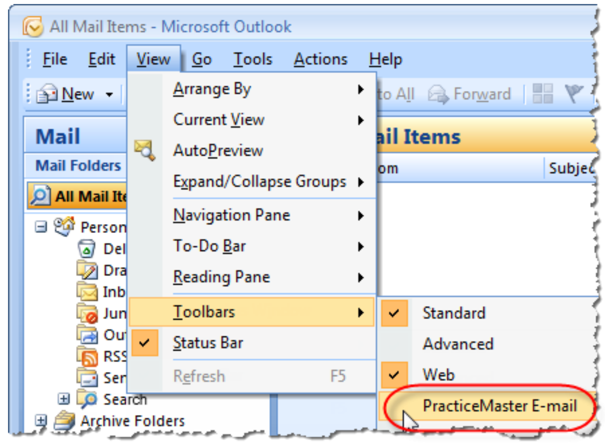
Quick Guide to the Outlook Plug-in

The Outlook Plug-in is the perfect tool for PracticeMaster users who want to work in Outlook for e-mail purposes. The Outlook Plug-in provides a means of tracking ***all*** case-related and business e-mails in a centralized location while still using Outlook. This guide will tell you everything you need to know about using the Outlook Plug-in!

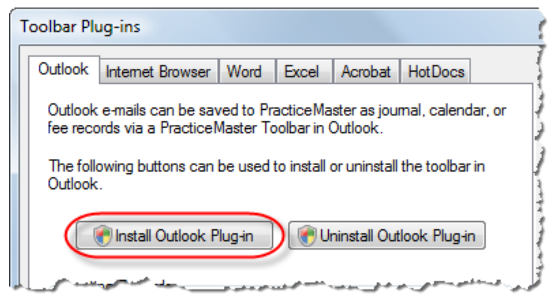


Getting Started

Typically, the Outlook Plug-in is installed simultaneously with PracticeMaster. However, the first thing you need to do is check if the Outlook Plug-in has already been installed. To do this, open Outlook and from the Outlook **View** menu, select **Toolbars** and look for **PracticeMaster E-mail**. If it is not there, you must install the Outlook Plug-in to continue. If it is already there, make sure there is a check mark next to it, and then skip to the **Using the Outlook Plug-in** section.

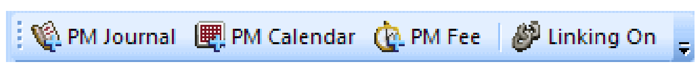
How to Install the Outlook Plug-in

To install the Outlook Plug-in, open PracticeMaster. From the **Maintenance** menu, point to **Integration** and select **Toolbar Plug-ins**. On the **Outlook** tab, click **Install Outlook Plug-in**, as shown in the figure on the right. Once the Outlook Plug-in is installed, restart Outlook.



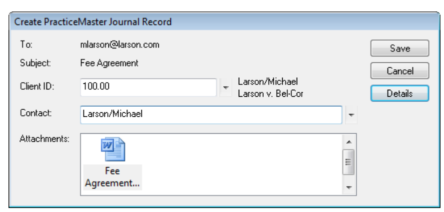
Using the Outlook Plug-in

When you open Outlook, a **PracticeMaster E-mail** option will be available as indicated in the top figure. When there is a check mark, the toolbar will appear and allow you to save any e-mail message in Outlook to PracticeMaster, whether it is a received message or a sent message. These e-mail messages can be saved as Journal records, Calendar records, and Fee records.

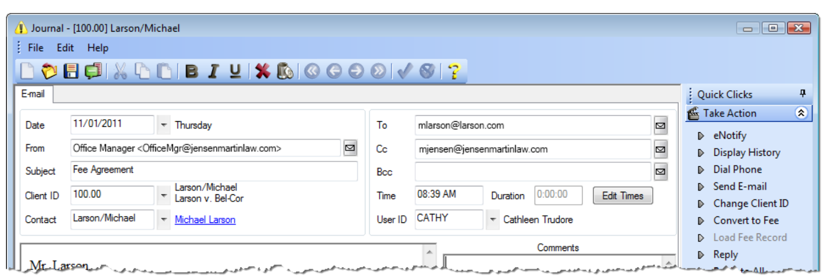


Received E-mail Messages: Journal Button

To create a PracticeMaster journal record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Journal** button. This will open a Create PracticeMaster Journal Record window with the information from the e-mail already filled in, as shown on the right.



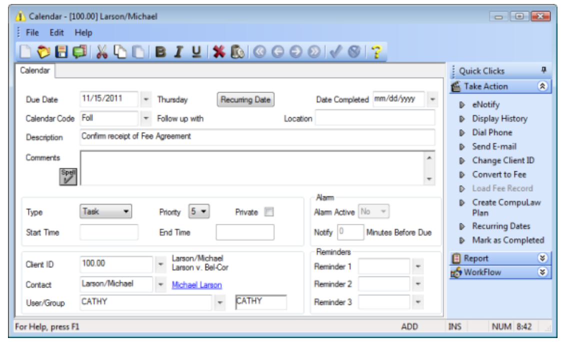
If desired, you can click the **Details** button to add comments regarding the e-mail. Click the **Save** button (or press *Ctrl+S*) to save the journal record to PracticeMaster.



Received E-mail Messages: Calendar Button

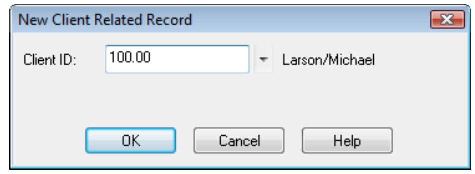
To create a PracticeMaster calendar record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Calendar** button. This will open a new PracticeMaster Calendar window with the information from the e-mail already filled in, as shown on the next page.

If desired, you can add comments regarding the e-mail. Click the **Save** button (or press *Ctrl+S*) to save the calendar record to PracticeMaster.

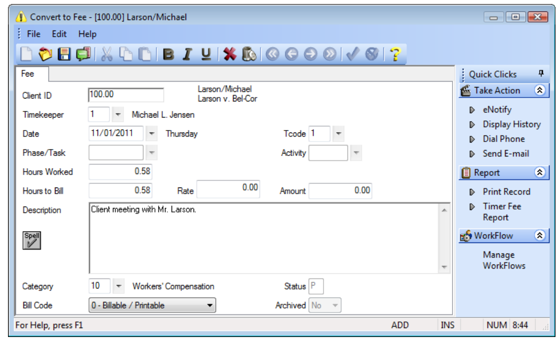


Received E-mail Messages: Fee Button

To create a PracticeMaster fee record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Fee** button. This will open a New Client Related Record window requesting that you enter a Client ID to be associated with the e-mail. After you enter a Client ID, click **OK**. A PracticeMaster Convert to Fee window will open with the information from the e-mail already filled in, as shown on the right.

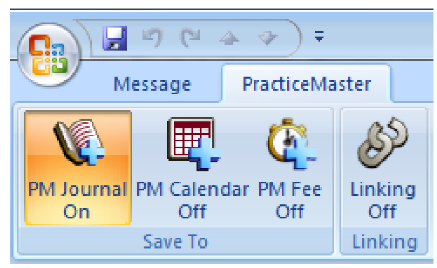


If desired, you can add comments regarding the e-mail. Click the **Save** button (or press *Ctrl+S*) to save the fee record to PracticeMaster.



When Sending E-mail Messages

When creating a new e-mail message, replying to a message, or forwarding a message in Outlook, the **PM Journal**¸ **PM Calendar**, and **PM Fee** buttons will appear in the toolbar. The figure to the right shows the **PM Journal On**, **PM Calendar Off**, and **PM Fee Off** buttons in a new e-mail message. Once the e-mail is sent, a PracticeMaster Journal window will be displayed allowing you to save the e-mail as a new Journal record in PracticeMaster. If the Calendar and Fee buttons had been On, the Journal window would have been followed by a PracticeMaster Calendar window, and then a PracticeMaster Fee window. If you don't want to save the e-mail in PracticeMaster, simply close the record without saving it, or click each of the toolbar buttons so they read **Off** instead of **On**.



Linking E-mail Messages

When creating a new PracticeMaster record from an Outlook e-mail, you can create Journal, Calendar, and Fee records. By default, the **Linking On** button is displayed. This button allows you to create one of each type of PracticeMaster record, and then updates the record indicators in your e-mail to reflect that a linked record has been created. Once created, clicking any of the three **Create/Load Record** buttons when linking is turned *On* will automatically open the linked record in PracticeMaster.

In the event that multiple records will be created, click the **Linking On** button so that **Linking Off** is displayed. By doing so, you can create unlimited PracticeMaster records that are created from, but not linked to, the Outlook e-mail. For example, let's say that an e-mail from a client prompted you to create journal records for each of the client's matters. Turn linking *Off* to quickly create multiple PracticeMaster records. Note that the record indicator in your e-mail will only be updated when a linked record is created.

Summary

As you can see, the Outlook toolbar is user-friendly, easy to install, and even easier to use. It allows you to save your Outlook e-mail messages in PracticeMaster without leaving Outlook, and create Fee and Calendar records, too! With just a click of a button, you can let PracticeMaster file your e-mails so all client-based e-mails are stored in PracticeMaster and accessible by all PracticeMaster users that have rights to the client. Once in PracticeMaster, right-click the journal record and use the **Convert To Fee** option to bill the client as desired; or simply create a fee record directly from the e-mail in Outlook.

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For more information:

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