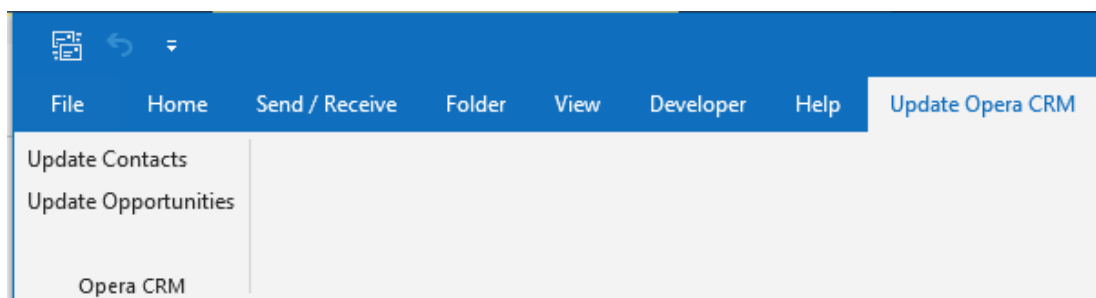


## Outlook Save to SPM Utility

The purpose of this utility is to allow for Microsoft Outlook emails (either a single email or a selection of emails) to be attached to the Contact – History tab, Opportunities – History tab or Helpdesk Processing – History tab in Pegasus Opera 3 Sales Pipeline Manager & Service Helpdesk

A new Add-In will be available on the Outlook Ribbon, as shown below.



This Add-In will be available when the user is in the main Outlook window, when they are reading emails, and when they are sending emails.

Email addresses must be unique to Opera CRM (as in one email links directly to one Contact) and must already be setup in Opera CRM when using the “Update Contacts” option as the email address will be used to locate the appropriate record. If no matching email can be located an appropriate message will be displayed.

If the Update Opportunities option is selected a new Windows Form will be displayed that allows the user to select the Opportunity the email(s) should be attached to. All selected email(s) will be attached to the selected Opportunity and only one Opportunity will be selectable at a time. For example, if 3 emails are selected which update 3 Opportunities then those 3 emails will need to be selected individually as the new Windows Form that is displayed will only give the user the option to select a single Opportunity.

If the Update Helpdesk option is selected a new Windows Form will be displayed that allows the user to select the Helpdesk call the email(s) should be attached to. All selected email(s) will be attached to the selected Helpdesk call and only one Helpdesk call will be selectable at a time in the same way as above.

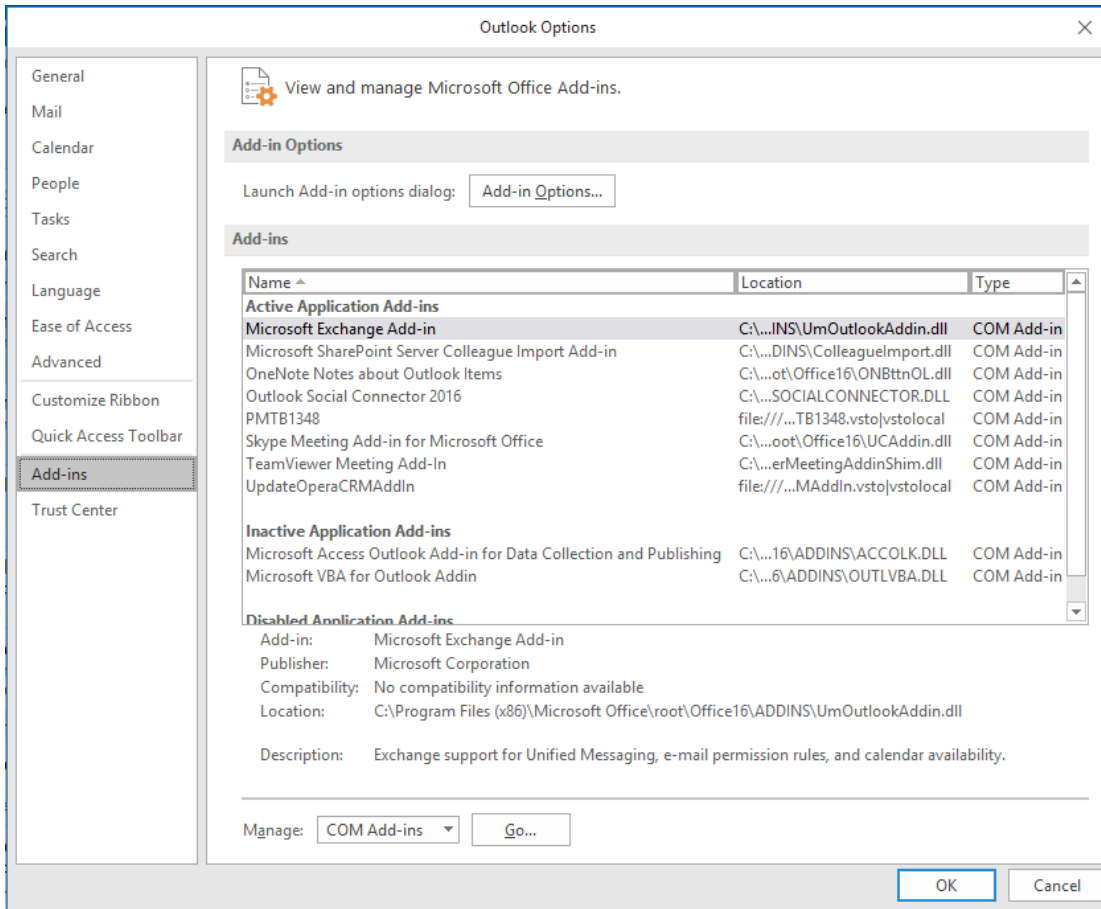
A configuration file will be provided that will allow for certain default values to be setup. This file will provide options for Opera Company ID, Opera Data Path and Opera Email Folder.

The selected email(s) will be exported to the appropriate Opera Folder and Opera will be updated directly from the Add-In.

This proposed solution will only work on a single Pegasus Opera Company. Once the selected email(s) have been linked to Opera, Opera will function as standard, no additional bespoke is required in Opera.

## Installation

To install the Outlook element of the bespoke the Setup.Exe file should be run. It is suggested that this is run with elevated privileges and needs to be installed on each Outlook client machine. If the install completes successfully then a new Group on the standard Ribbon Bar will be available, as shown above. You can check if the Add-in has been installed correctly by checking the Outlook Options – Add-ins page:



If the Outlook Add-in is no longer required it can be removed by clicking on the PTAO0026 option in the Add-ins page shown above and then clicking the Go.. button and then unchecking PTAO0026 from the list that is displayed

**Outlook Save to SPM Utility - £650.00**

**Annual Maintenance and Support - £135.00**