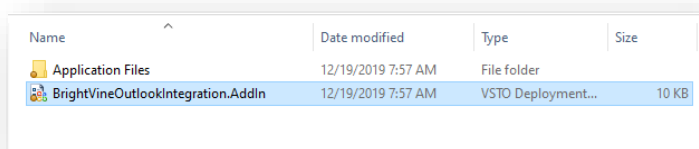


Objective: Introduce the Outlook Integration and its functionality to make constituent/prospect management more productive and organized. This serves as a link between your Outlook emails, appointments, and assigned prospects. This integration allows you to add emails to BCRM as interactions or contact reports, update constituent information, and add plan steps and interactions to your Microsoft Outlook calendar. Emailing prospects becomes easier than ever when contact information from their constituent record syncs to your Outlook Contacts; and functionality exists to create new constituent records as well as plan steps from emails you receive.

### Installation

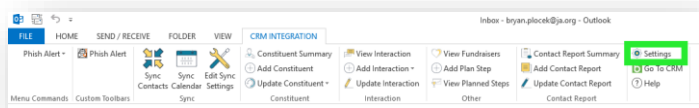
#### Download and Install Outlook Add-In

1. Close **Outlook**
2. Click [here](#) to download the software or go to [Outlook Integration Download](#)
3. Click the BCRM Outlook Integration
4. Click download
5. After the file has downloaded, open the file
6. Extract **BCRM Outlook Installer.zip** file to C: or D:
7. Open the **BCRM Outlook Installer** folder
8. Open the **ClickOnce Installer** folder
9. Double-click **BrighVineOutlokIntegration.AddIn**



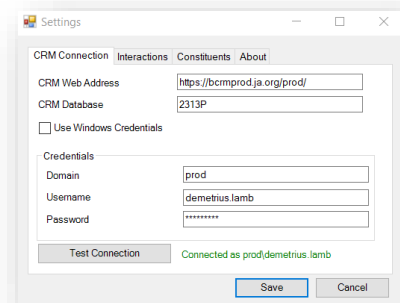
### Configuration

1. Open **Outlook**
2. Click the **CRM Integration** tab

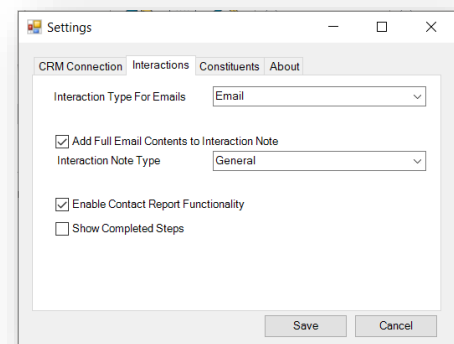


3. Click **Settings** from the right-hand column on the ribbon
4. Enter the below information:
  - a. CRM Web Address: <https://bcmprod.ja.org/prod/>
  - b. CRM Database: **2313P**

- c. Uncheck the **Use Windows Credentials** checkbox
- d. Enter **Prod** in the **Domain** field
- e. Enter your credentials (first.last name and Password)
- f. Click the **Test Connection** button
- g. Click OK on the connections test popup



5. Click the **Interactions** tab
6. Enter the below information:
  - a. Interaction Type for Emails: Email
  - b. Checkbox for **Add Full Email Contents to Interaction Note**
  - c. Interaction Note Type: General
  - d. Checkbox for **Enable Contact Report Functionality**



- Click the **Save** button

## Features

### Sync Information

#### Sync Contacts

- In BCRM set yourself as the **Prospect Manager** for your prospects
- In Microsoft Outlook, Click the **CRM Integration** tab
- Click **Sync Contacts**
- Navigate to your Address Book
- Look at your contacts
- The prospects you manage will appear in the list

#### Sync Calendar

- In Microsoft Outlook, Click the **CRM Integration** tab
- Click **Sync Calendar**
- Open steps and interactions from BCRM are now added to your Outlook calendar

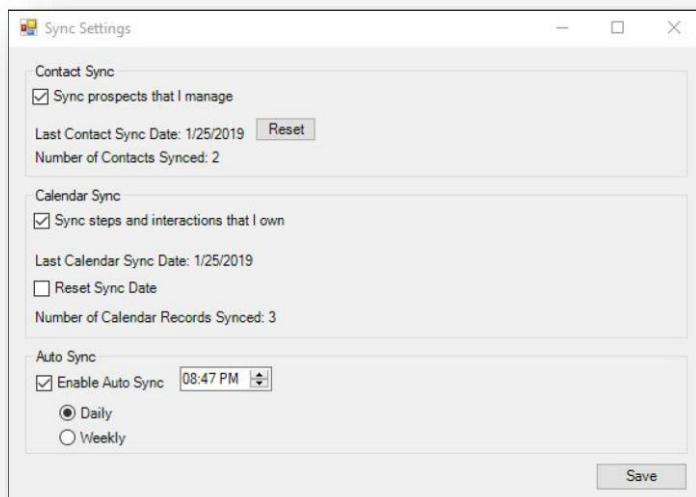
### Edit Sync Settings

#### Edit Contact Settings

- In Microsoft Outlook, Click the **CRM Integration** tab
- Click **Edit Sync Settings**
- Check the **Sync prospects that I manage** checkbox to define if you want your prospects synced

#### Edit Calendar Settings

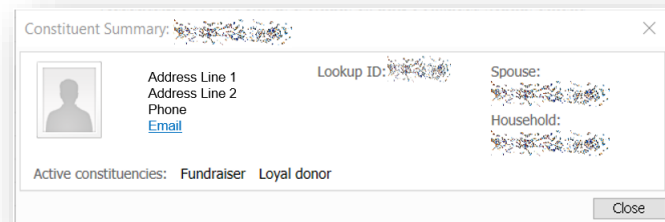
- From Microsoft Outlook – Click the **CRM Integration** tab
- Click the **Edit Sync Settings**
- Check the **Sync steps and interactions that I own** to have your interactions added to your calendar
- Click the **Reset Sync Date** checkbox to clear the amount of records that have been synced



## Constituent Summary

### Constituent Summary

- Highlight a message in Microsoft Outlook
- Click the **CRM Integration** link from the top menu bar
- Click the **Constituent Summary** button from the CRM
- Multiple Emails**
  - If there are multiple returned matches, a message will display prompting you to perform a search
  - Click **No** to close the popup window and not run the constituent summary functionality
  - Click **Yes** to proceed
  - Click the **Search** button
  - Click the matching constituent from the results
  - Click the **Select** button
  - The Constituent Summary view will display
    - Address
    - Phone
    - Email
    - Lookup ID
    - Spouse
    - Household
    - Active constituencies
    - Picture if available
  - Click the **Close** button to close the popup window



### 5. One Matching Email

- The Constituent Summary view will display

## Add Constituent

1. Highlight a message in Microsoft Outlook
2. Click the **CRM Integration** link from the top menu bar
3. Highlight a message in Microsoft Outlook mailbox
4. Click the **Add Constituent** button
5. If the email matches an existing constituent record, the system will display a message alerting you that the constituent already exists in the system
6. If the email does not exist in BCRM, an **Add an individual** popup will display
7. Add information in any of the three tabs (Individual, Household, and Business) and click the **Save** button to save the new constituent
8. Click the **Cancel** button to close the window without saving the constituent's record

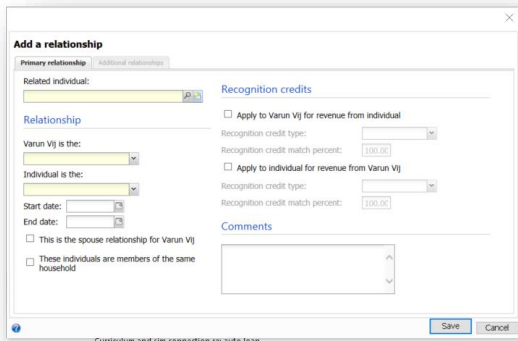
## Edit Constituent Information

1. Highlight a message in Microsoft Outlook
2. Click the **CRM Integration** link from the top menu bar
3. Highlight a message in Microsoft Outlook mailbox
4. Click the **Edit Personal Information** link
5. If the email matches an existing constituent record, the system will display a message alerting you that the constituent already exists in the system
6. If the email does not exist in BCRM the **Add an individual** popup will display
7. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click **No** to close the popup window and not run the constituent summary functionality
  - c. Click **Yes** to proceed
  - d. Click the **Search** button
  - e. Click the matching constituent from the results
  - f. Click the **Select** button
  - g. The **Edit personal information** popup screen displays

8. **One Matching Email**
  - a. The **Edit Personal Information** popup view will display

## Add Relationship

1. Highlight a message in Microsoft Outlook  
Click the **CRM Integration**
2. Click **Update Constituent**
3. Click **Add Relationship**
4. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click **No** to close the popup view and not run the constituent summary functionality
  - c. Click **Yes** to proceed
  - d. Click the **Search** button
  - e. Click the matching constituent from the results
  - f. Click the **Select** button
  - g. The Add a relationship popup window will display
  - h. Add information on the **Primary relationship** tab
  - i. Once information is added you will have access to the **Additional relationships** tab
  - j. Click the **Cancel** button to close the window without creating the relationship
  - k. Click the **Save** button to save the relationship for the constituent
5. **One Matching Email**
  - a. The **Add a relationship** popup will display



## Interactions

### View Interactions

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **View Interaction**
4. If no interactions are found, a message will display
5. If the interaction has previously been added, the associated interaction for the email will display as read-only

### Add Interactions – From Constituent

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **Add Interaction**
4. Click **From Sender**
5. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click **No** to close the popup window and not run the constituent summary functionality
  - c. Click **Yes** to proceed
  - d. Click the **Search** button
  - e. Click the matching constituent from the results
  - f. Click the **Select** button
  - g. The **Add an interaction for “constituent name”** popup view will display
  - h. Add information on the window
  - i. All fields with a yellow background are mandatory
  - j. Click **Cancel** to close the popup window without adding the interaction
  - k. Click **Save** to save the interaction for the selected constituent
6. **One Matching Email**
  - a. The **Add an interaction for “constituent name”** popup view will display

### Add Interactions – From Search

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab

3. Click **Add Interaction**
4. Click **From Search**
5. The **Constituent Search** popup window will display
6. Enter search criteria
7. Click the **Search** button
8. Click the correct constituent from the results
9. The **Add an interaction for “constituent name”** popup window will display

### Update Interaction

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **Update Interaction**
4. The associated interaction will display with the ability to edit

## Other

### View Fundraisers

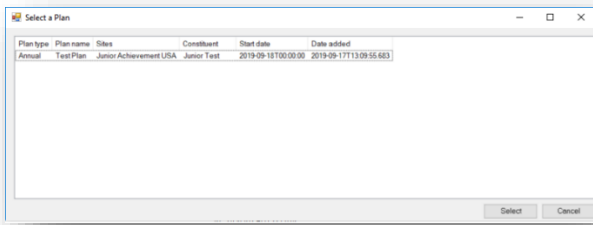
1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **View Fundraisers**
4. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click **No** to close the popup window and not run the constituent summary functionality
  - c. Click **Yes** to proceed
  - d. Click the **Search** button
  - e. Click the matching constituent from the results
  - f. Click the **Select** button
  - g. The **Fundraisers** popup window will display the assigned Prospect Manager and Team members
5. **One Matching Emails**
  - a. The **Fundraisers** popup view will display

### Add Plan Step

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **Add Plan Step**
4. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click **No** to close the popup window and not run the constituent summary functionality
  - c. Click **Yes** to proceed
  - d. Click the **Search** button
  - e. Click the matching constituent from the results
  - f. Click the **Select** button
  - g. The **Select a Plan** popup window will display a listing of the plans associated with the constituent

## 5. One Matching Email

- a. The *Select a Plan* popup view will display



6. Highlight the plan name
7. Click the *Select* button
8. The *Add a step for "constituent name"* popup window will display

9. Add information to the window
10. Fields with a yellow background are mandatory
11. Click the *Cancel* button to close the popup window without saving the step
12. Click the *Save* button to save the new step to the constituent's prospect plan

## View Planned Step

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the *CRM Integration* tab
3. Click *View Planned Steps*
4. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click *No* to close the popup window and not run the constituent summary functionality
  - c. Click *Yes* to proceed
  - d. Click the *Search* button
  - e. Click the matching constituent from the results
  - f. Click the *Select* button
5. The *Prospect Plan Steps* popup view will display a listing of all steps with the *Planned* status

## 6. One Matching Email

- a. The *Prospect Plan Steps* popup window will display

## Contact report

### Contact Report Summary

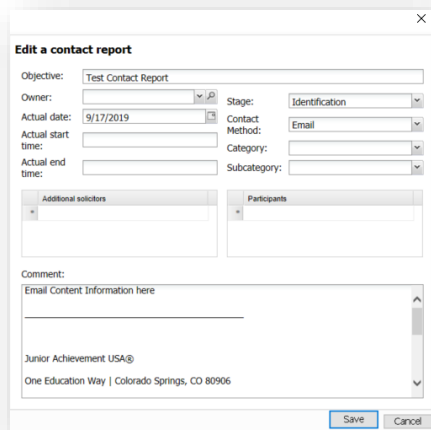
1. Highlight an email in your Microsoft Outlook mailbox
2. Click the *CRM Integration* tab
3. Click *Contact Report Summary*
4. A popup window will display the contact report information related to the email

### Add Contact Report

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the *CRM Integration* tab
3. Click *Add Contact Report*
4. **Multiple Emails**
  - a. If there are multiple returned matches, a message will display prompting you to perform a search
  - b. Click *No* to close the popup window and not run the constituent summary functionality
  - c. Click *Yes* to proceed
  - d. Click the *Search* button
  - e. Click the matching constituent from the results
  - f. Click the *Select* button
  - g. The *Select a Plan Step* popup window will display the assigned Prospect Manager and Team members
  - h. You can also check the *File an Unplanned Contact Report* checkbox
5. **One Matching Email**
  - a. The *Select a Plan Step* popup window will display
6. Highlight the plan from the *Select a Plan Step* window
7. The *File a contact report* popup window will display
8. Add information
9. Fields with a yellow background are mandatory
10. Click the *Save* button

## Update Contact Report

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the **CRM Integration** tab
3. Click **Update Contact Report**
4. The **Edit a contact report** popup window will display with the information related to the contact report created for the email



The screenshot shows a window titled "Edit a contact report" with a close button (X) in the top right corner. The window contains the following fields and sections:

- Objective:** Text input field containing "Test Contact Report".
- Owner:** Dropdown menu.
- Actual date:** Date picker showing "9/17/2019".
- Actual start time:** Time input field.
- Actual end time:** Time input field.
- Stage:** Dropdown menu showing "Identification".
- Contact Method:** Dropdown menu showing "Email".
- Category:** Dropdown menu.
- Subcategory:** Dropdown menu.
- Additional solicitors:** A list box with a plus sign (+) and a minus sign (-) on the left side.
- Participants:** A list box with a plus sign (+) and a minus sign (-) on the left side.
- Comment:** A text area containing "Email Content Information here" and "Junior Achievement USA®  
One Education Way | Colorado Springs, CO 80906".
- Buttons:** "Save" and "Cancel" buttons at the bottom right.