

## InterAction for Microsoft Outlook - 6.25

InterAction for Microsoft Outlook connects to the InterAction central database, while allowing you to work in Microsoft Outlook. This Quick Reference Guide shows you the latest features and functionality in IMO 6.25.

#### **InterAction Ribbon**

By using the InterAction ribbon the InterAction pane can be closed to reclaim space on Outlook. The InterAction ribbon gives easy access to the same features as the pane. The buttons on the ribbon adjust to display available options to the Outlook screen that are accessed.

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L	<b>1</b>	<b>@</b>	@ >	Ļ	1		4	7		1			<b>X</b> .	All Contacts	*	Q	?
	New Contact •	New Activity	Log this Email	Business C Card	Connections	Upcoming Meetings	Interactions	Notes	View Reports	View Reminders	View Alerts	Pane	Settings				Help
L		Actions			Cont	act Informa	tion			View		Pref	erences		Search		Help

If there is an alert associated to a contact, then a View Alerts button appears.

Clicking the **View Alerts** button opens a snapshot view of New and Previously Viewed alerts.

InterAction - Activity Detail	-0
	E-mail Activity (Edit
Reminded About When: 3/3/2014	
Reminded About Fred Flintstone - Call to follow up on custody case	
Call to follow up on custody case	
Linked Contacts:	
Fred Fantatione	
Who Can See This: Driv Me	
Loggent By:	
Desiree Lackey as 2/2/2014 10:22 PM	
Neor	

## **Clickable Links in Notes/Activity Detail**

Notes are used to discuss activities, such as phone calls, meetings, etc. Website addresses display as clickable links, which open in your web browser.

My Notes	Company Notes	
		1
Contacted Ja	mes from http://www.lexisnexi	s.com

New	the second s
	Scott C, Winter (UNG-RDU) at Lexishesis Meeting (Quantry Price: Status Board Miners 12/2018); ILIO AM 1200 MI Eastern Daylight Time Organism Caref C, Board D, Miner (UNG-RDU) Lagged Today 2223 PM (Scott C, Winter (UNG-RDU)
Previos	nly Viewed
	Scott C. Winter (I/MG-R01) at Lexibless Employment Update   Scott Winter, Associate Product Manager, is no longer lated as a employee of Lexibless Interfaction Winter 3/2/20214 Updated 3/2/20214 LI-84 AM ( Carol Pool
	Seo Schertz at LeastRivers InterAction, Scott C. Winter (JJ/G-R00) at LeastNews Meeting, Monthly ELSS Flocket, Management Team Call Where JJL2204 2013 (2014) 2014 William Davidge Time Organization, Insult Paracely Logged: JM22014 2014 (2014) Zichafone
3	Find Finitume Reminded About   Reminded About Find Finitistions - Call to fullow up on custody one Where 37/20214 Logged 3//20214 L020 PM   Designer Lackey
	Field Pilotstane Phone Call   Custody Follow Up Where: 3/3/2014

Open an alert to view the entire message by clicking the alert notification.



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### Creating Email (To/CC/BCC)

Directly email a contact from a contact card. Add additional contacts using the email options from the pop-up menu.

- 1. Search for the contact.
- 2. Click the Menu button and select Email To, Email CC, or Email BCC.
- If a second contact is required on the email, restart the process by searching for the contact, click the **Menu** button and select which option to use. This process applies to the active page from which you are working currently.



View Employees for a Company from the Search Results

Display a list of employees who work for a particular company, who have been added as a contact.

- 1. Search for the company name.
- 2. Click the desired company name.

- 3. Click the **Menu** button.
- 4. Select **View Employees** from the list.



#### Add Lists to a New Contact

Add a new contact to a Marketing or Working list.

- 1. On the Contact window, click the Lists tab.
- 2. Select either My Lists or All Lists radio button.
- 3. Check the box next to the appropriate list/lists.
- 4. Save or Save and Close when finished

