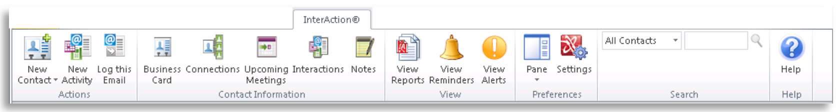
InterAction for Microsoft Outlook – 6.25

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.

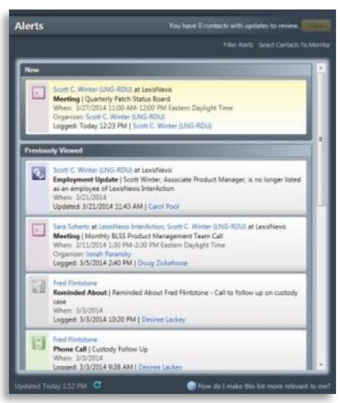
InterAction Ribbon

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.

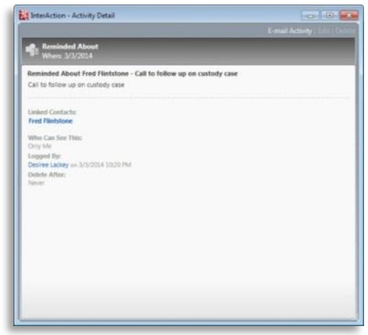


If there is an alert associated to a contact, then a **View Alerts** button appears.

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



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



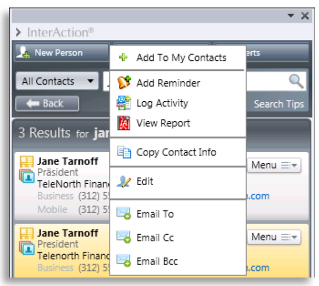
Clickable Links in Notes/Activity Detail

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

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**.
3. 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.



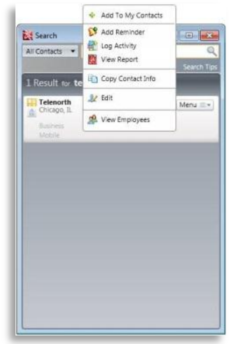
Note

If the Menu button is not used to select an option, then the contact's email address will populate in the To: field.

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.



Note

If the only match on a contact is a company name, then the company name is returned instead of the contact name.

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

Note

Lists are utilized only when a contact is shared with the company. To add a contact to a list, change the Contact State to **Shared with Company**.