



# Zanibal Plug-in For Microsoft Outlook

## Installation & User Guide

### Version 1.0

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## Table of Contents

<b>1</b>	<b>INTRODUCTION.....</b>	<b>3</b>
1.1	OVERVIEW .....	3
1.2	INSTALLATION STEPS.....	4
<b>2</b>	<b>USING THE ZANIBAL PLUG-IN FOR MICROSOFT OUTLOOK.....</b>	<b>8</b>
2.1	ARCHIVING EMAIL.....	8
2.1.1	<i>Composing and Archiving Emails</i> .....	8
2.1.2	<i>Archiving Existing Email Items</i> .....	9
2.1.3	<i>Archiving Outlook Email with Existing Zanibal Records</i> .....	10
2.1.4	<i>Archiving Outlook Email with New Zanibal Suite Records</i> .....	11

# 1 Introduction

## 1.1 Overview

Welcome to the Zanibal Plug-in for Microsoft Outlook®. This guide describes the installation and use of the Zanibal Plug-in for Microsoft Outlook.

Release 1.0 of the Plug-in for Microsoft Outlook features enables you to do the following:

- Archive existing Outlook email items with various Zanibal records
- Synchronize Outlook calendar, task and contact items with Zanibal
- Create and view Zanibal records directly from within Outlook

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## 1.2 Installation Steps

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Follow the steps below to install the Zanibal Plug-in for Microsoft Outlook

### Close Outlook

You must first close Outlook prior to un-installing or installing the Zanibal Plug-in for Microsoft Outlook. Please be sure to close the Outlook client and any Outlook-related windows and programs.

### Uninstall Previous Plug-in

Although it is not required, it is recommended that you uninstall any previous versions of the Plug-in.

- From the Windows Start button select *Control Panel*, then *Add/Remove Programs*.
- From the *Add or Remove Programs* window select the Zanibal Plug-in for Microsoft Outlook item, and then select the *Change/Remove* button.
- Follow the instructions the uninstall wizard provides to remove the previous version.

### Install New Plug-in

To install the new Plug-in, unzip the downloaded package and run the **setup.exe** self-extracting installer. The installer will guide you through the few screens necessary to install Zanibal Plug-in for Microsoft Outlook. Once you have completed the installation program, start the Outlook client. After the installer confirms that all the prerequisites are present you will see a screen similar to that shown below.

Note that the prerequisites for this plug-in are

- a. .NET Framework 2.0
- b. Microsoft Visual Studio Tools for Office Runtime Redistributable
- c. Microsoft Office 2003 Outlook (SP2) - a component of Microsoft Office (You can buy this from <http://office.microsoft.com> or upgrade from <http://www.microsoft.com/downloads/details.aspx?FamilyId=57E27A97-2DB6-4654-9DB6-EC7D5B4DD867&displaylang=en>)
- d. Microsoft Office 2003 PIA Redistributable

The installer will guide you through the process of installing these components if they are not found on your computer.

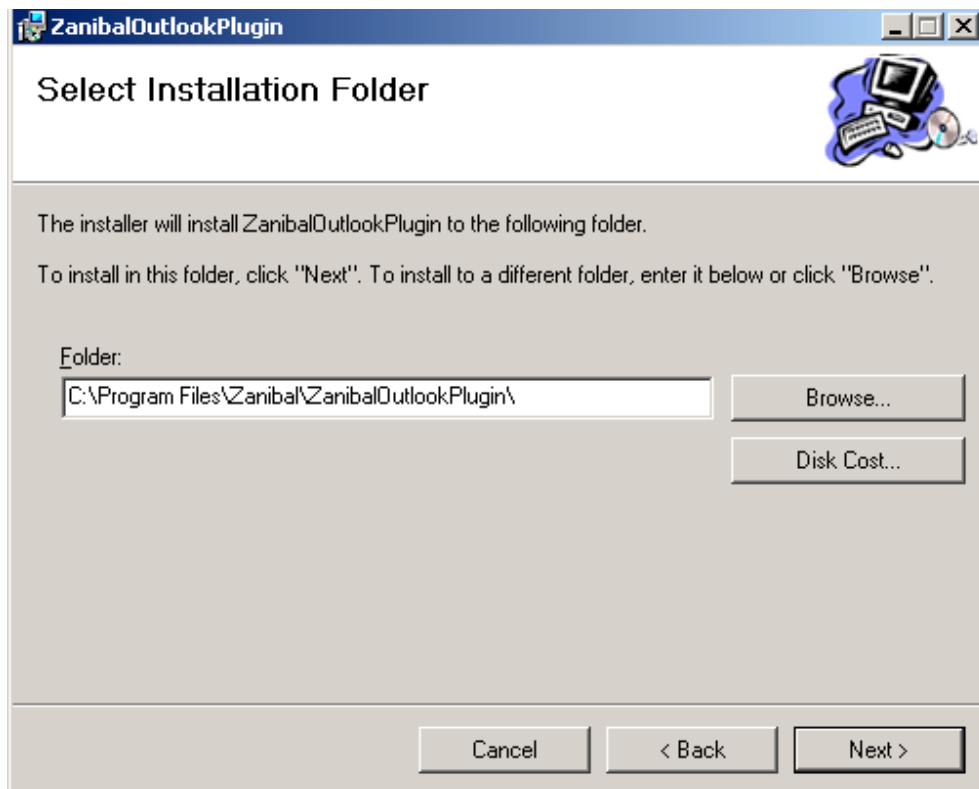
### Installation Wizard

The installation wizard walks you through the Zanibal Plug-in for Microsoft Outlook installation process. The wizard screens and their descriptions are as follows:

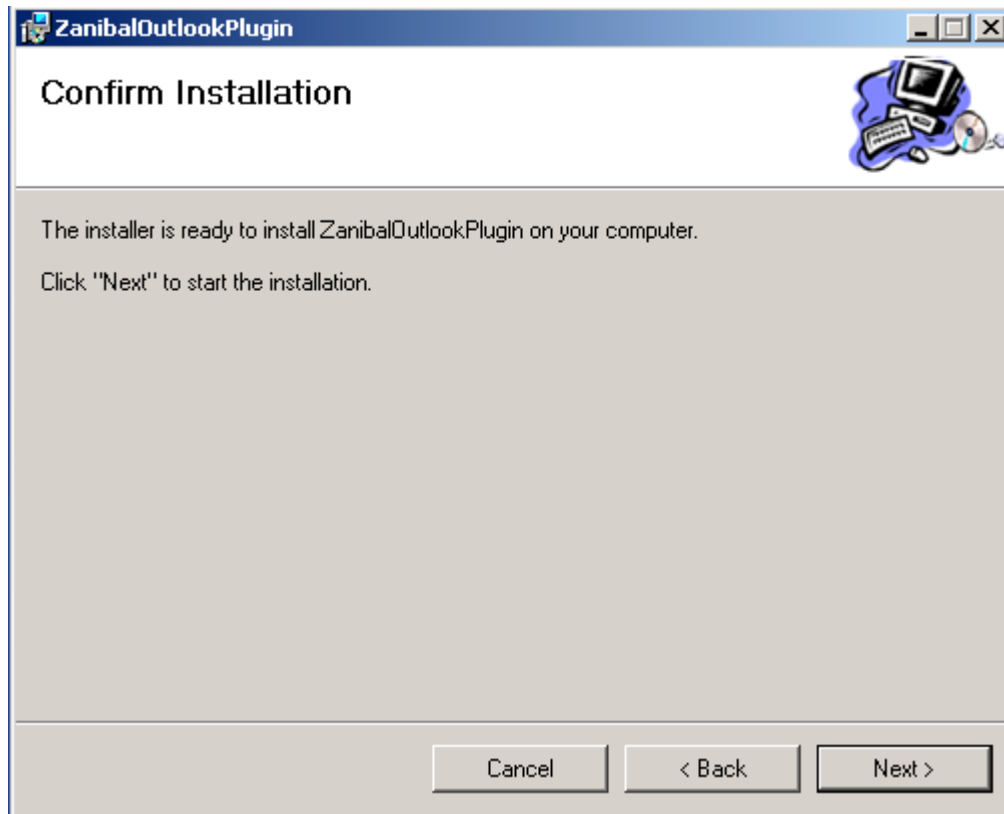
**Version & License page:** The first Wizard screen below indicates the version of the Plug-in you are about to install and describes the license terms.



**Installation Location:** This identifies the location where the Zanibal Plug-in will be installed on your PC. You can leave the default location, or Browse to select an alternate location. Once you have decided where it should be installed, press the **Next** button to proceed.



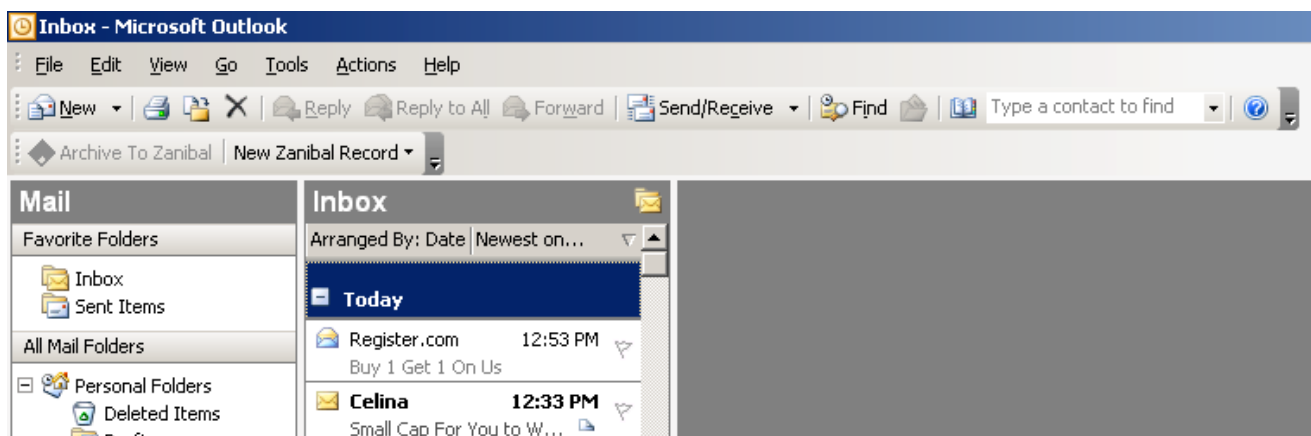
**Installing:** You will see a screen similar to that shown below, where you will confirm the installation by clicking on the Next button.



**Installation Completed:** A final window will appear indicating the Plug-in has been installed. Press the **Close** button to exit the setup wizard.

### Start Outlook

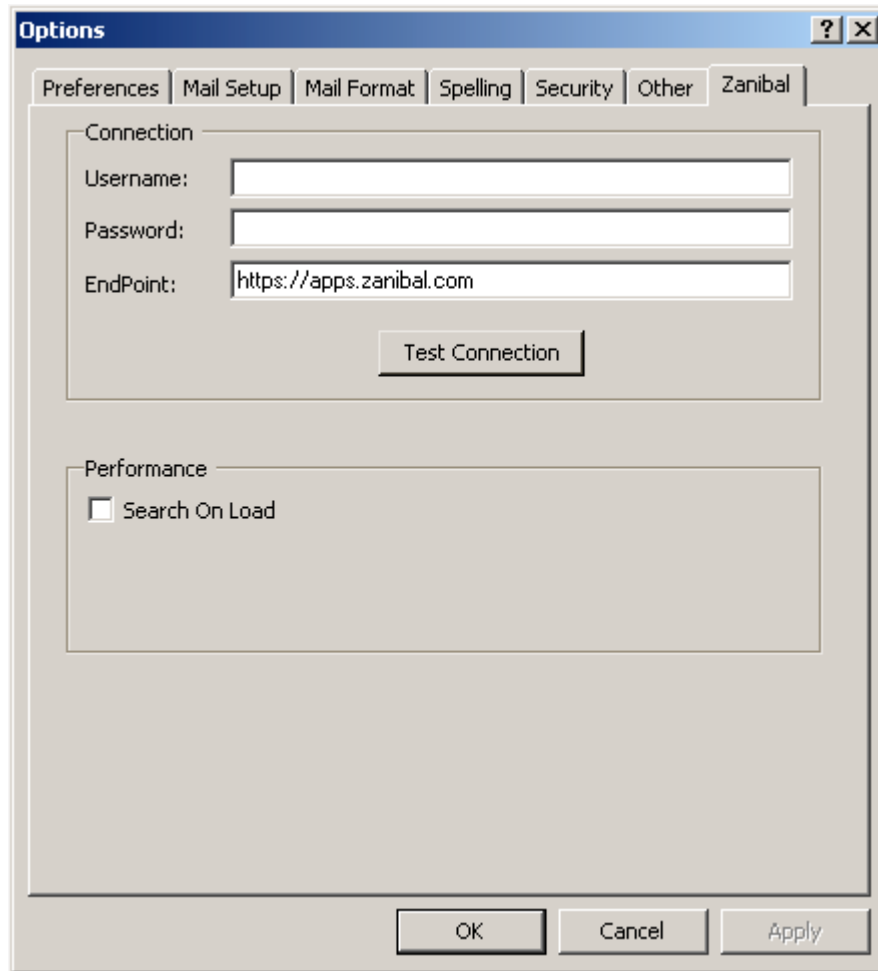
Start Outlook and you will see the Zanibal Plug-in for Microsoft Outlook toolbar directly beneath the standard Outlook toolbar.



## Configuring the Zanibal Plug-in for Microsoft Outlook

The next step is to configure Zanibal Plug-in for Microsoft Outlook to point to your Zanibal server and to establish login credentials.

1. Click Tools -> Options to access the Zanibal Plug-in for Microsoft Outlook configuration dialog box shown below.



The screenshot shows the 'Options' dialog box with the 'Zanibal' tab selected. The 'Connection' section contains three text input fields: 'Username:', 'Password:', and 'EndPoint:' with the value 'https://apps.zanibal.com'. Below these fields is a 'Test Connection' button. The 'Performance' section contains a checkbox labeled 'Search On Load' which is currently unchecked. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

2. In the Connection section of the dialog box above, type your Zanibal username and password. This is the username and password of the Zanibal user for whom Contact and Calendar synchronization will occur and for whom Outlook email items are archived. Type the values exactly as if the Outlook user were logging in to the Zanibal Application itself.
3. In the URL field specify the URL of your Zanibal Server instance – <http://apps.zanibal.com> in our example. Contact your administrator or [support@zanibal.com](mailto:support@zanibal.com) if you are not sure of what to enter here.
4. Use the Test Connection button to verify your settings.
5. Click on Apply and Press OK to close the dialog box and return to Outlook.

## 2 Using The Plug-in

This section describes how to use the Zanibal Plug-in for Microsoft Outlook. The Zanibal Plug-in for Microsoft Outlook provides Zanibal Suite users with the ability to:

- Synchronize Outlook and Zanibal Suite Contact, Calendar and Task information.
- Archive Outlook email items with Zanibal Suite Accounts, Cases, Contacts, Leads, and Opportunities.
- View Zanibal records from within Outlook.
- Create Zanibal Cases, Contacts, Leads, and Opportunities.

### 2.1 Archiving Email

The Zanibal Plug-in for Microsoft Outlook provides a convenient way to archive (associate) Outlook email with Zanibal Documents:

- Accounts
- Cases
- Contacts
- Leads
- Opportunities

Any Outlook email item can be archived to Zanibal records, providing a powerful means of recording important customer interactions.

There are two ways email can be archived:

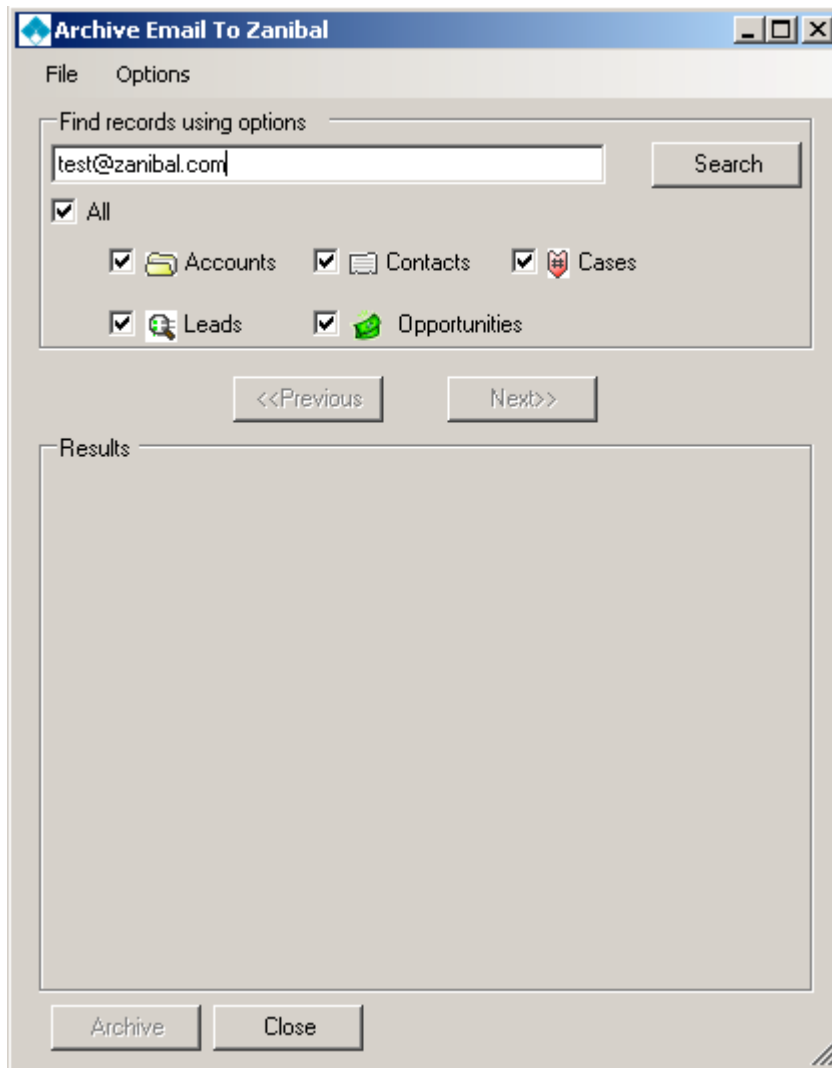
1. When composing an email
2. By selecting existing email items

Each is described next.

#### 2.1.1 Composing and Archiving Emails

Zanibal Plug-in for Microsoft Outlook allows you to send and archive emails in one easy step. When you have finished composing an email, press the "Send & Archive" button to begin the process. Zanibal first invokes the normal Outlook send function. Only after the email is sent will the archival step begin.

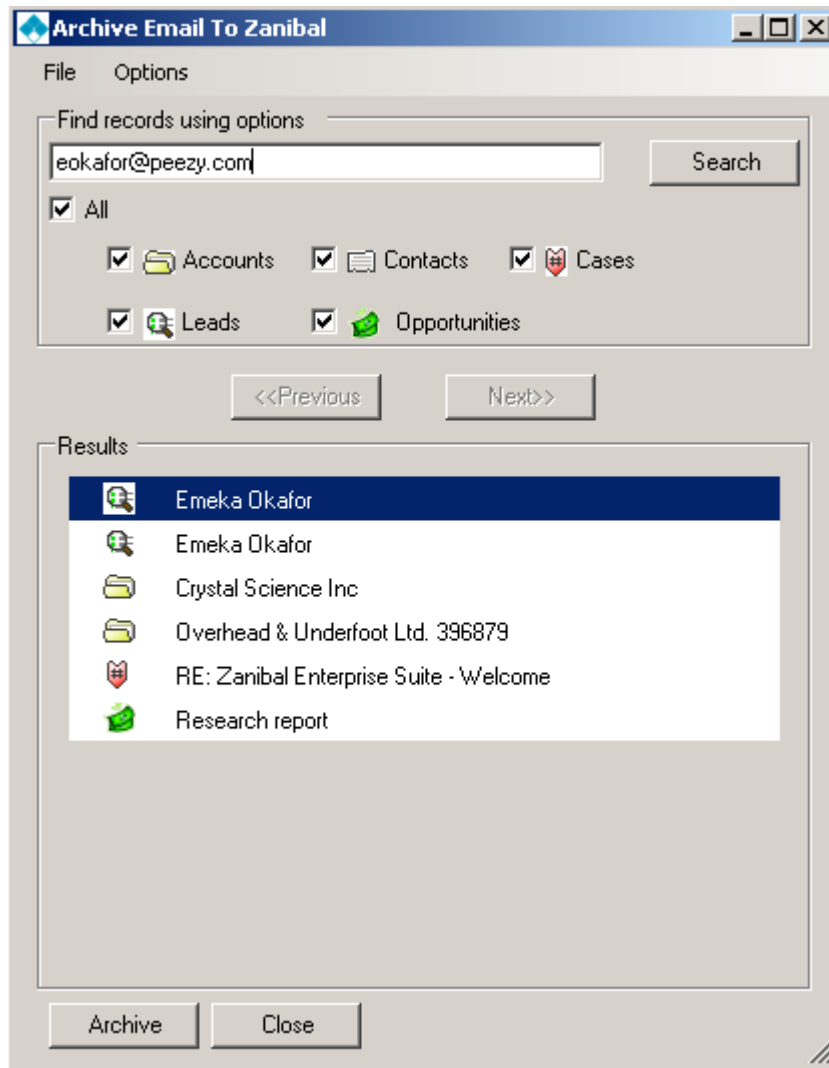
The Archive Email to Zanibal screen is shown below and is described in detail later.



### 2.1.2 Archiving Existing Email Items

Zanibal Plug-in for Microsoft Outlook provides for the convenient archival of existing email items. You can archive a single email or multiple emails in one archive step. Any number of Zanibal items, including items from different modules, can be the target of the archival process.

Select the email items that you want to archive “Archive to Zanibal” and the dialog box shown below appears. It will search your Zanibal records for any Leads or Contacts whose email address match an email address in the “To” or “From” fields of the first email item. Note that you have to check the “Search on Load” box in the options page to enable the auto search feature.



At this point, the email can be immediately associated with the highlighted item by pressing the Archive button. This action immediately creates a History record in Zanibal that stores the email correspondence for the selected item. You can repeat this for as many Zanibal items and the email will be archived to each in turn.

### 2.1.3 Archiving Outlook Email with Existing Zanibal Records

If you wish to associate an email to Zanibal records, you must first identify the appropriate Zanibal records. Let's say you wish to associate the current email with an Account named 'Crystal Science Inc'. To do this, clear the Search field and enter the leading characters of the Account name ending it with a wild card symbol e.g. '**Cryst%**' (Be sure the Accounts checkbox is set.)

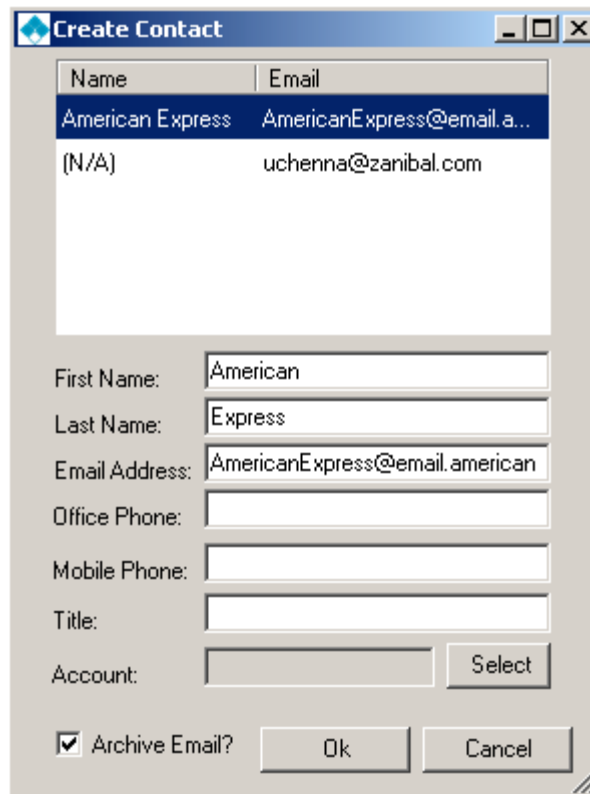
Displayed in the list box will be records matching the search criteria, including Account records. Select the appropriate Account record and press **Archive**. The email will be immediately archived to the Account you choose.

You may search for records from multiple Zanibal modules and archive emails to any combination of Zanibal items.

#### 2.1.4 Archiving Outlook Email with New Zanibal Records

Zanibal Plug-in for Microsoft Outlook provides a convenient method to create new Zanibal records. This is helpful when you wish to begin collecting important correspondence for records which may not currently exist in Zanibal Suite.

Let's say you want to create a Contact record in which to associate the current email(s). Select the Contact option from the "New Zanibal Record".



Name	Email
American Express	AmericanExpress@email.a...
(N/A)	uchenna@zanibal.com

First Name: American

Last Name: Express

Email Address: AmericanExpress@email.american

Office Phone:

Mobile Phone:

Title:

Account: [ ] [ Select ]

Archive Email? [ Ok ] [ Cancel ]

The *Create Contact* dialog appears allowing you to specify Contact field values. Click Ok to save *the new contact* record. A Zanibal Suite Contact record is immediately created and the selected email(s) archived to the new record.