Mail Logger
Visma Business
Add-In
User Manual

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Welcome to the Mail Logger for Visma Business

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Introduction

The Mail Logger for Visma Business enables the logging of Outlook email to Visma Business.

Configuration

Before the Mail Logger Add-In can be used it has to be configured.

Outlook 2003 – Outlook 2007

In Outlook 2003 / Outlook 2007 the settings button is in the 'Tools' menu:

Outlook 2010 – Outlook 2013

In Outlook 2010 and 2013 the settings button is in the Home ribbon:

The settings properties screen is shown:

A. **Server address:** This is the address of the server which runs the Mail Logger Service. The link should contain either the IP address or the DNS name of the server.

B. **Use default port / Alternative port:** In most cases the Mail Logger Service will be running on the default port: 8200. In rare situations this can be different. To change the port, uncheck 'Use default port' and fill in the alternative port.

C. **Show dialog when operation succeeded:** When this box is checked the add-in will show the following dialog if the mail was successfully logged:

D. **Store messages as HTML:** When this box is checked the email will automatically be archived as a .htm file. If this box is not checked the emails are archived as .msg files.

E. **Log sent messages:** If this option is enabled the add-in will automatically show the 'Log Mail' screen for each sent mail message.

F. **Transfer attachments:** By enabling this option all attachments of the logged emails are archived as well. All attachments are stored individually in the document table of Visma Business.

Configuration storage location

The configuration made in the options panel is stored in the registry under the following key:

HKEY_CURRENT_USER\Software\VismaMailSendOutlookAddin

Logging email

To log an email to Visma Business, select an email in Outlook and right click on it. Press the Log mail button to continue:

The Mail Properties screen is shown:

A. **Firms:** If multiple firms are configured in the Mail Logger Service Configurator you can select the appropriate firm from the list.

B. **User:** The user that will be will be the ‘created by in Visma Business.

C. **E-mail Properties**

Edit Mail Properties: By pressing edit you can change the e-mail properties that will be logged to Visma Business.

Associate: In this list you can select the Visma Business associate that sent or received the e-mail. By default, the add-in looks up the email address of the associate in Visma Business. If found, it will be displayed automatically in the associate field.

Contact: In this list you can select the Visma Business contact that sent or the e-mail. By default, the add-in looks up the email address of the contact in Visma Business. If found, it will be displayed automatically in the contact field.

Created: The creation date of the e-mail that is logged to Visma Business.

Modified: The date the e-mail that is logged to Visma Business was changed.

Subject: The subject of the e-mail that is logged to Visma Business.

D. **Link Mail**

The following lists contain various properties for the e-mail that is logged to Visma Business. It's possible to search through the lists using the number or the name of the item.

The first 3 fields are dependent on the configuration in the Mail Logger for Visma Business Configurator.

Field 1 - The first organizational unit field that is specified in the Service Configurator.

Field 2 - The second organizational unit field that is specified in the Service Configurator.

Field 3 - The third organizational unit field that is specified in the Service Configurator.

Product - The product that the e-mail is linked to.

Order - The order that the e-mail is linked to.

Doc. Group - The document group the e-mail is logged under.

Saving

By pressing the 'OK' button the mail is saved to Visma Business.

Limitations

This section contains a list of known limitations of the Mail Logger Add-In.

Inline images in RTF e-mails
When logging RTF emails and the setting ‘Log sent messages’ is turned on any inline-images in the e-mail will not be logged as individual attachments in Visma Business.

Separate attachments of HTML emails not stored
Attachments of HTML e-mails will not be logged due to restrictions of the HTML e-mail format. Inline images *will* be displayed in the HTML e-mail.

http://www.vismaplaza.com/Apps/Mail-Logger-for-VISMA-Business

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