

Work in CharityEngine.

Without ever leaving **Outlook®**



Connector Plug-in for Microsoft Outlook®

- Save email communications in Outlook directly on the recipients CharityEngine record.
- Set tracking rules for always, single messages, or never
- Add a contact's Address, Phone and Employer info for their CharityEngine record.

Fall 2018, Volume 1

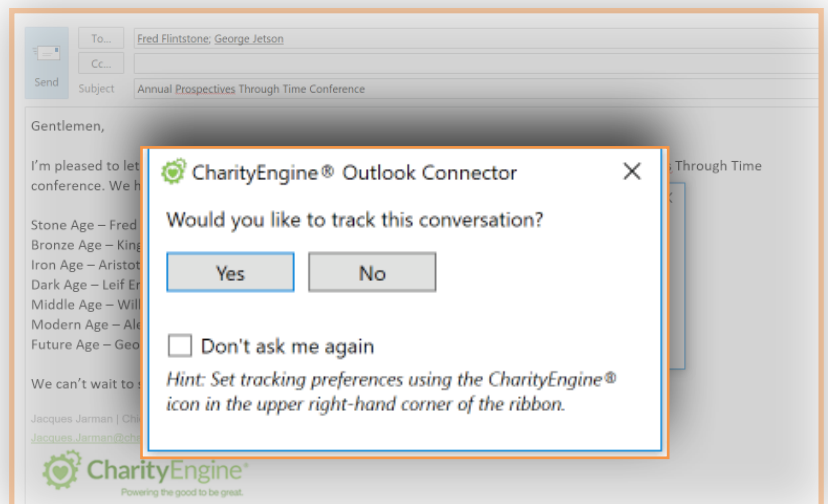
Connector Plug-in for Microsoft Outlook

Let fundraisers work in Outlook. We'll take it from there.

Whether it's gift officers, development staff, events staff, or anyone sending emails, people don't always have time to make sure emails and information are getting into their donor database. So CharityEngine does it for them.

CharityEngine's Outlook Connector lets you auto-save emails in Microsoft Outlook to a contact record in CharityEngine. If the contact does not yet exist, the Outlook Connector will also let you create a record for that person.

1. Sync your emails directly into CharityEngine



George Jetson (gjetson@Spacely.com)

Name	George	Middle
Phone	301.555.2345	Landline
	301.555.5432	Mobile
Address	Skypad Apartments, #365, Orbit City MD 20878	
Employer	Spacely Space Sprockets	
	Referential Universal Digital Indexer	
	1 Spacely Drive, Orbit City MD 20874	Current Office
	301.555.6789	Landline

Track Conversations

- Track Conversations
- Track This Message
- Don't Track This Message
- Don't Track Conversations

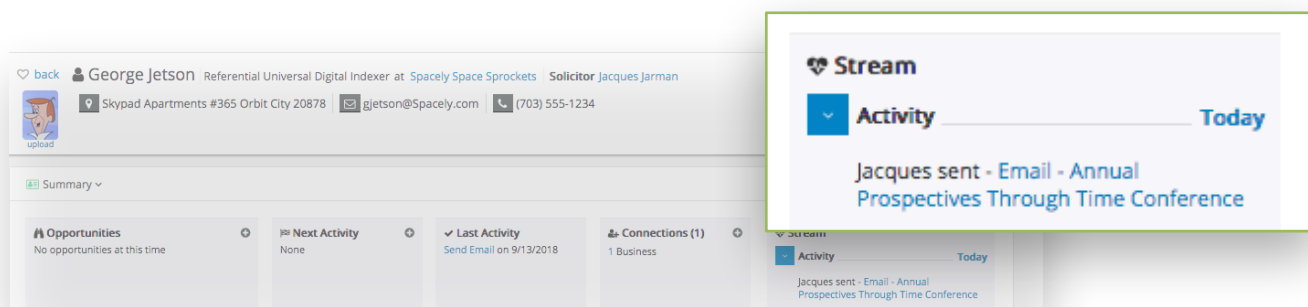
2. Create new Contact Records if they aren't already in there.

Manage the Donor Journey without even logging in.

What is CharityEngine & Outlook Connector?

CharityEngine is a Customer Relationship Management (CRM) platform for nonprofits, meaning it's a database and collection tool for managing and sharing everything that a Customer, or Donor, does with the organization so you can provide them a great customer experience. That can be event attendances, donations, pledges, or even just what direct mail pieces they receive from you.

Outlook Connector is a plug-in for Microsoft Outlook that makes it easy for fundraisers to sync their email conversations with their donors to the actual contact record in CharityEngine. All you have to do is click a button once, and you can make sure that every email gets saved onto the donor record without you doing any extra work. And if there are people who you don't want to track communications with, you simply mark them as such.



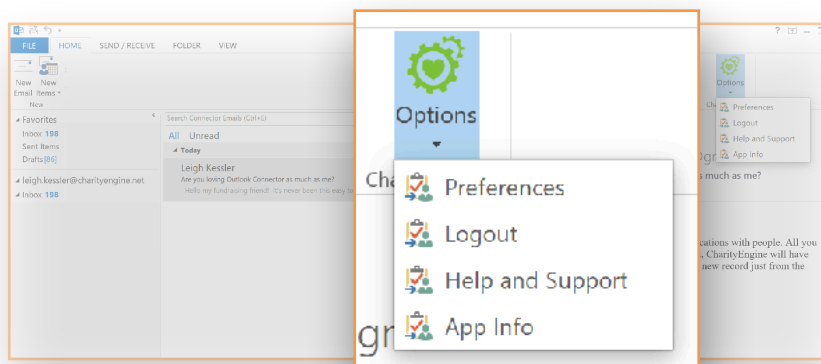
In this example, an email sent from Jacques to George Jetson, with the subject line “Annual Perspectives Through Time Conference” was automatically placed on George’s Contact record in CharityEngine.

What you will learn in this document

1. How Outlook works with CharityEngine
2. **Understanding the Different Options** for Tracking People
3. How to **set-up a new person** to be tracked in CharityEngine
4. How to **add a person’s contact info** to their CharityEngine record
5. How to **track a person** who sent an email to you
6. How to **track multiple people** at one time
7. How to **track some people but not others** from within one email
8. How to **NOT track people**
9. **Troubleshooting** for Outlook Connector.
10. How to **Download Outlook Connector**

1. How Outlook works with CharityEngine

Once you've loaded the free Outlook Connector tool (OC), the CharityEngine green gear icon will appear in the top right corner of your Outlook Window. This means the App is enabled!



If you do not see the gear icon, the OC is either not installed or not connected. See our [Troubleshooting Tips](#) at the end of this guide for help.

2. Understanding the Different Options for Tracking People

By tracking people, we mean that CharityEngine can automatically turn the emails that you send or receive in Outlook into an Activity on the contact records of the people involved in that email. It can sync the sender, and any other recipients whether in the To Field or the CC field.

If the sender/recipient is not in CharityEngine as a contact record, the system will create a record for them. If the email address/person is already in the system, it will apply the email send/receive as an activity on that record.

Track/Don't Track Conversations means that the system will automatically follow that instruction for future email exchanges without asking you each time. **Track/Don't Track Messages** means that your instruction only pertains to this particular email and in the future, you may want to track the message so you will be asked each time. This chart shows what will happen for each selection.

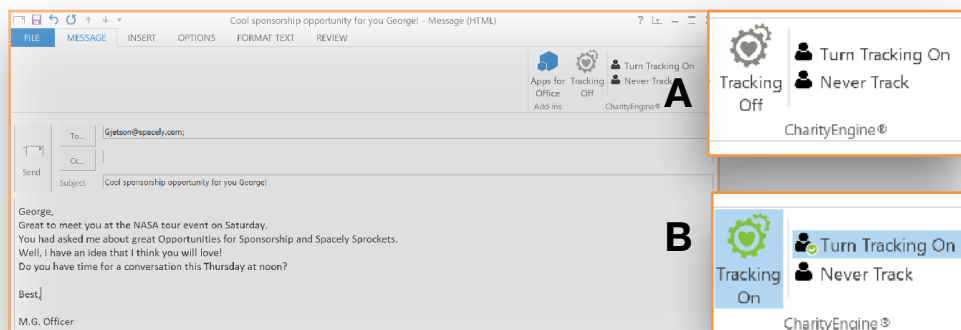
If you select....	Will it create a new Contact record in CE if none exists?	Will it create a record of the email exchange in CE?
Track Conversations	Yes	Automatically always, unless manually altered
Track This Message	Yes	Saves this message, but not future messages
Don't Track this Message	No	Does not save message, but does not assume you don't want to save future messages
Don't Track Conversations	No	Never saves a record of the exchange in CE

3. How to set-up a new person to be tracked in CharityEngine

When you start a new email, type the recipients email address in the To field.

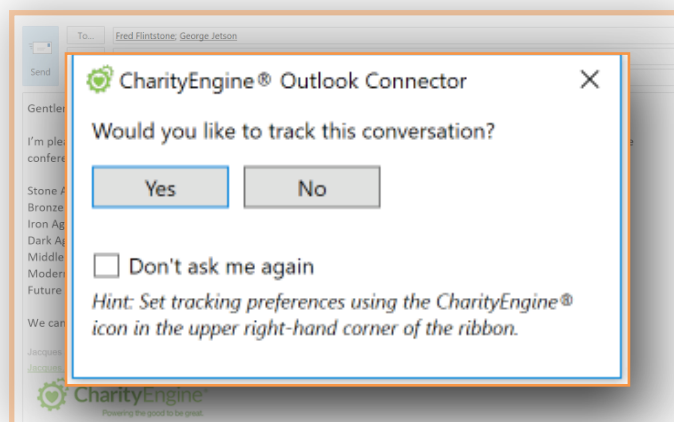
If the person is new, or has not been flagged as someone you want to track, the O.C. icon on the Email window will be grey, **(A)** meaning it is off, with the option to Turn Tracking on or Select Never Track.

If the person is already in your Outlook and you have identified them as someone to regularly track communications with, the OC icon will be green **(B)** with Turn Tracking on highlighted.



Important! Whether you want to track them or not, Click Send.

After you click send, a popup box **(C)** will ask if you want to **track this conversation**. This means you want to either just track the message or always track this person.



If this answer is NO to both, and you do not want to track conversations with this person or this particular message, **click No**. Nothing else is required.

If this answer is Yes and you DO want to track this message, or all future messages with this person, **click Yes**.

4. How to add a person's contact info to their CE record

After you select Yes, and before the email actually sends, another screen will appear in Outlook that allows you to add the recipient's contact information to their CharityEngine record. You can also add contact info about their employer. This is a great way to ensure new contacts are added to the database correctly and that all contacts have as much helpful data on record as possible!

The screenshot shows the 'CharityEngine® Conversation Tracking' window. It displays contact information for 'George Jetson (gjetson@Spacely.com)'. The form includes fields for Name (George, Middle), Phone (301.555.2345 Landline, 301.555.5432 Mobile), Address (Skypad Apartments, #365, Orbit City MD 20878), and Employer (Spacely Space Sprockets, Referential Universal Digital Indexer). A dropdown menu labeled 'Track Conversations' is open, showing options: 'Track Conversations', 'Track This Message', 'Don't Track This Message', and 'Don't Track Conversations'. A letter 'D' is placed to the right of the dropdown menu.

In the Track Conversations drop-down (D), Select whether you want to Track all of your Conversations with this individual or Only track this message. If you select Don't Track This Message or Don't Track Conversations, the contact record in CharityEngine will NOT be created, even if you fill out the personal info.

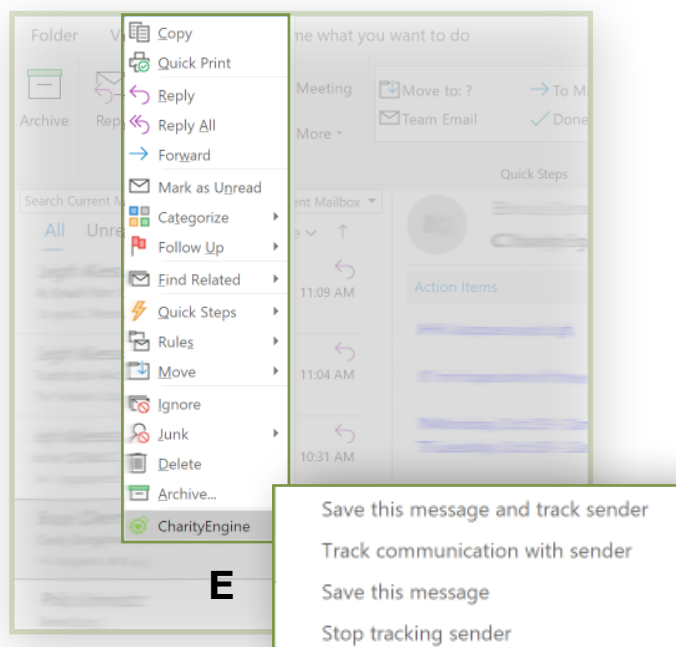
5. How to track a person who sent an email to you

Did you receive an email from someone you are not tracking but want to?

Right click on the email in your inbox and you'll see all of your quick action options. The CharityEngine Outlook Connector is at the bottom of that list. **(E)**

Click the arrow and your options will appear. Set your tracking preferences for that contact.

You will also have a chance here to add additional contact info to that record if it doesn't currently exist in CharityEngine as shown in Section 3.



6. How to track multiple people at one time

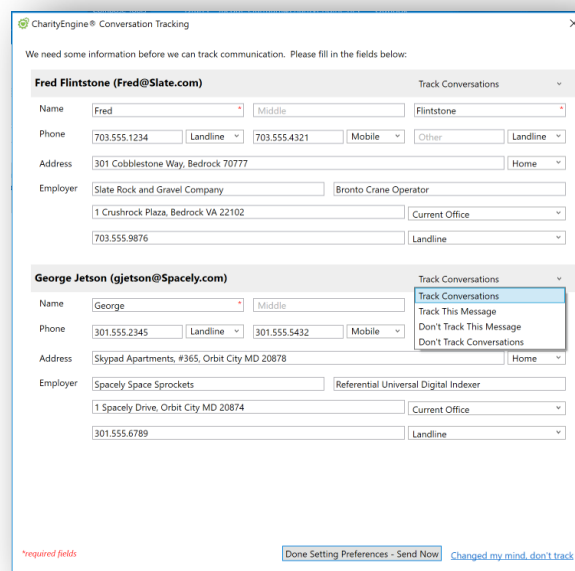
Tracking multiple people at once works just like tracking a single person.

When you select Yes in the “Track This Conversation?” window, it will open the Contact Record entry window, just like in section 4, except this time it will show all of the recipients.

You can select whether you’d like to track the people on a one-by-one basis.

Refer to the chart in Section 2 for options.

You will also have a chance here to add additional contact info to that record if it doesn’t currently exist in CharityEngine as shown in Section 3.



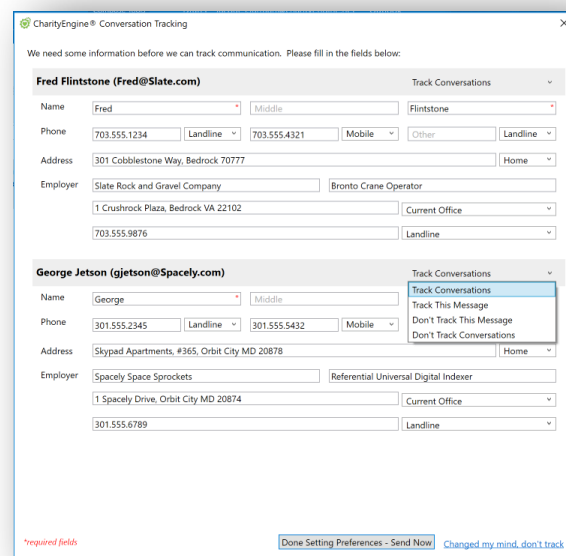
The screenshot shows the "CharityEngine® Conversation Tracking" window. It contains two contact forms. The first form is for "Fred Flintstone (Fred@Slate.com)" and the second is for "George Jetson (gjetson@Spacely.com)". Each form has fields for Name, Phone (Landline, Mobile, Other), Address, and Employer. A "Track Conversations" dropdown menu is visible for each contact, with options: "Track Conversations", "Track This Message", "Don't Track This Message", and "Don't Track Conversations". The "Track Conversations" option is selected for both contacts. At the bottom, there are links for "Done Setting Preferences - Send Now" and "Changed my mind, don't track".

7. How to track some people but not others within one email

As explained in section 6, you will be able to set up different Tracking Options for multiple people within a single email.

Next to each email recipient’s name is a field called Track Conversations. Just set each person as to if, and how often, you want to keep them tracked.

Refer to the chart in Section 2 for options.



This screenshot is identical to the one above, showing the "CharityEngine® Conversation Tracking" window with contact information for Fred Flintstone and George Jetson. The "Track Conversations" dropdown menu for George Jetson is highlighted, showing the options: "Track Conversations", "Track This Message", "Don't Track This Message", and "Don't Track Conversations".

8. How to NOT Track people

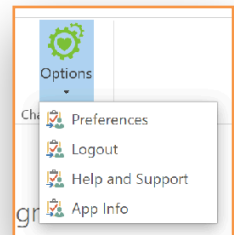
We know you don't want to track everybody. After all, emails from your cousin, or more importantly, co-workers, do not need to be in CharityEngine.

If you have never selected Track Conversations when sending someone a message, they will NOT be tracked.

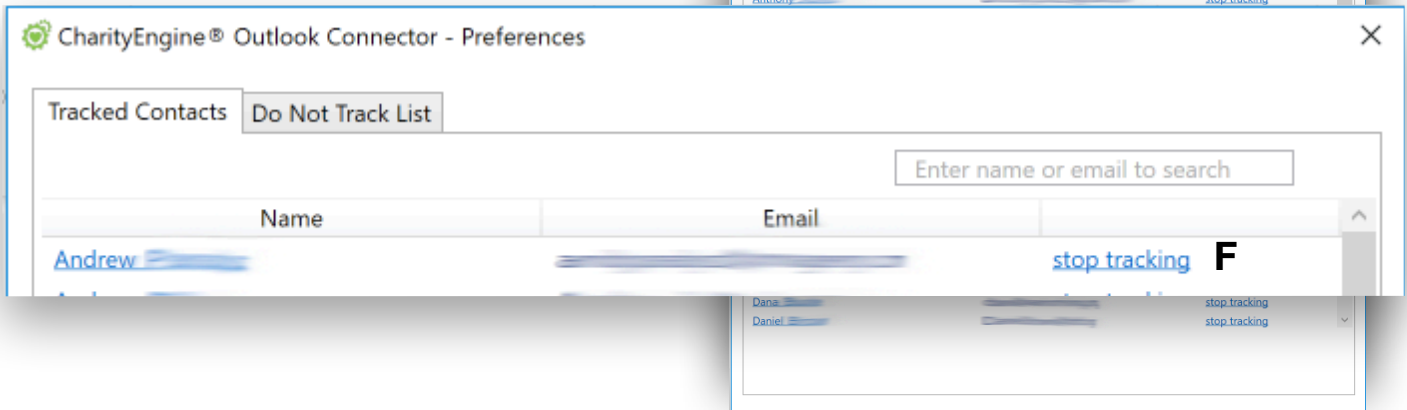
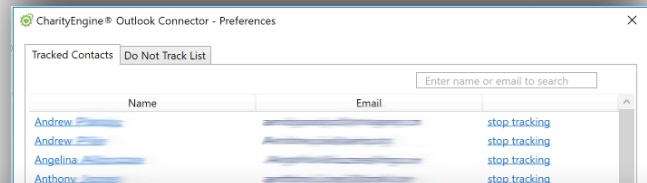
If you are tracking someone, and want to remove them from the auto-tracking, here is an easy way to manage it.

Go to the Green Options Gear Icon and select Preferences.

This will show your list of which contacts are on your Tracking List and which are on your DO NOT TRACK list.



Click the Stop Tracking link (F) next to the person you want to stop tracking.



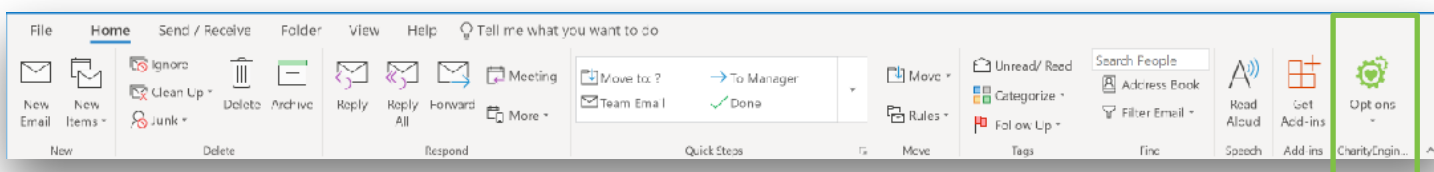
At any time, you can review who you are tracking and who you have placed on your Do Not Track List. You can remove people from either list at any time.

9. Tips for Troubleshooting

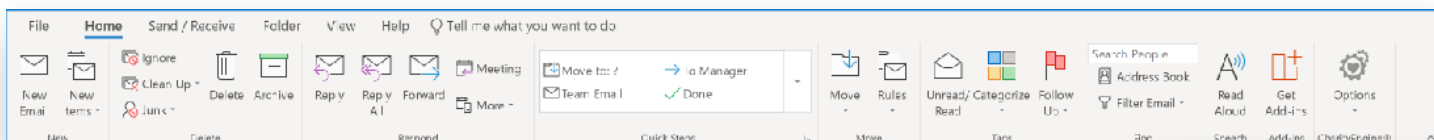
As a Microsoft plugin that securely connects to your CharityEngine instance, there are a number of things that could cause the CharityEngine Outlook Connector to stop working. Below are the most common things to review if you experience a problem:

Is the CharityEngine Outlook Connector loaded?

Your Outlook toolbar may be slightly different, but you should see the CharityEngine add-in gear icon toward the right of your toolbar. When it is green, it is working. If it is grey but not working, contact Support.

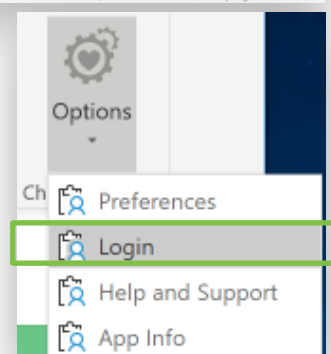
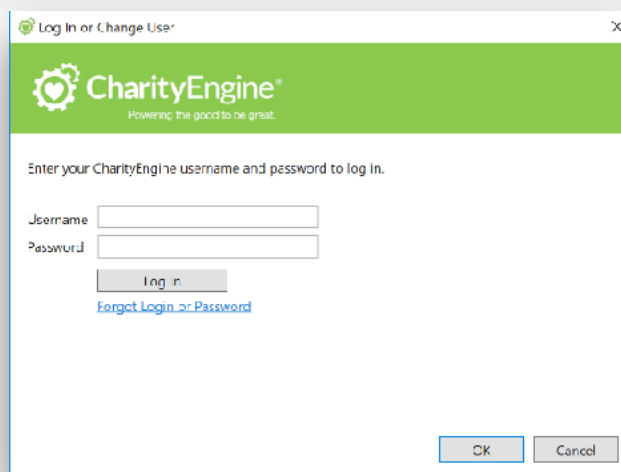


If the gear is present but it is grey, that means it is loaded but you are not connected to CharityEngine. Click the drop down arrow and click Login.



Login using your CharityEngine username and password.

This should reconnect you and should turn Outlook Connector on.



If the gear is NOT present, quit and restart Outlook. If after restarting Outlook, it appears, just enter your CharityEngine username and password and you should be fully enabled.

If it still does not appear after restarting Outlook, go to the next section.

If the Connector does not appear upon restarting Outlook, check to see if Outlook has disabled the add-in.

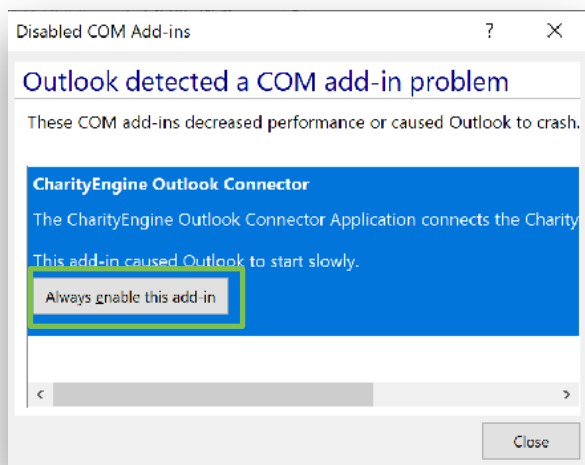
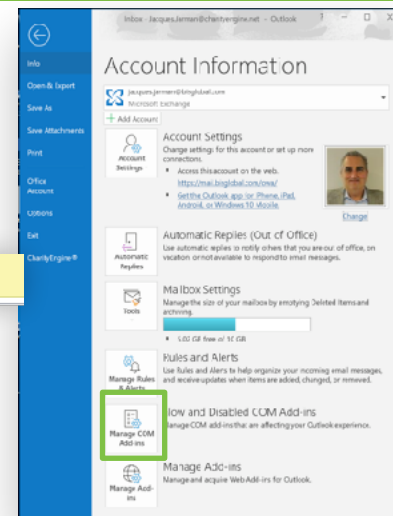
If you see this alert on login (G), click View Disabled Add-ins.

G

ADD-IN PROBLEM A problem was detected with an add-in and it has been disabled.

[View Disabled Add-ins...](#)

If you don't see that alert, click on the File Menu in Outlook and select **Manage Add-ins (H)**. When you see the add-in listed, make sure the *Always enable this add-in* button is selected. (I)



If the add-in is not listed in Outlook by selecting **Manage Com Add-ins**, go to the Help Center in CharityEngine to download and install the plugin.

Important: By default, Outlook turns off non-Microsoft add-ins that load slowly. Because the Outlook Connector needs to securely connect to your instance of CE, the number of applications you have open in Windows, the size of your email database and the quality of your internet connection, may cause it to take several seconds to

9. Downloading Outlook Connector

To Download Outlook Connector, go to the Help Section of CharityEngine and Click on the Outlook Connector tab on the left menu. (J)
Then click the Download Now button. (K)

J

Outlook Connector

Follow the install wizard as you would any other add-in or product.

Once installed, enter your CharityEngine username and password when requested.

