



Partner

Partner XE™ Outlook® Integration

**When you need systems that work together,
look to Partner XE for best in the business
Outlook Integration**

*Always Searching for Ways to Serve You Better,
SIS is More Than Just a Software Company*

In many circles the word Outlook is synonymous with email, and paper calendars are a thing of the past. How else do you schedule recurring appointments, invite clients and coworkers to meetings, and carry your schedule around on your PDA?

It is this prevalence in the marketplace that makes Outlook integration with your agency management system so important. Outside of your agency, the world relies on Outlook. Inside of your agency, it's Partner XE. To avoid redundant entering, they need to work together.

Knowing this, SIS created an Outlook Add-In for Partner XE which facilitates two way integration between Partner XE and Microsoft Outlook 2007 or higher.

The screenshot shows an Outlook window with an email titled "Auto insurance deductibles - Message (HTML)". The email content is: "Please give me a call to review our auto insurance policy. thanks,". Below the email is an "Address Book - Client Susan Test [TE0710311059269]" window. This window has fields for Name (Primary: Susan Test, Secondary:), Salutation (Susan), Title, Company, Since, SSN, Tax ID, Type (Unknown), Status (Active), and a Key section with Sort (Test) and Client ID (TE0710311059269). At the bottom, there is an "Email" table with columns: Type, URL /, Description, and Allow Auto-Add.

Type	URL /	Description	Allow Auto-Add
Other Email	mcquade.susan@yahoo.com		<input checked="" type="checkbox"/>
Email	Tester@sisware.com		<input type="checkbox"/>

What Our Clients Say:

"The integrated email communication is fabulous. The ability to capture email communication with underwriters and clients within the system is excellent. The fact that it integrates with Outlook® in a plug-and-play fashion makes it easy."

-Kevin O'Brien

Streamline Workflow

Contact SIS Today!

1-800-747-9273

sales@sisware.com



simple.innovative.secure



Outlook Integration

How it works:

Partner XE Calendar

Once you have installed the Partner XE Outlook add-in, the Outlook 2007 tool will check your XE calendar every five minutes for new appointments and add them to your Outlook calendar, which will synchronize within seven days of today's date.

Emails

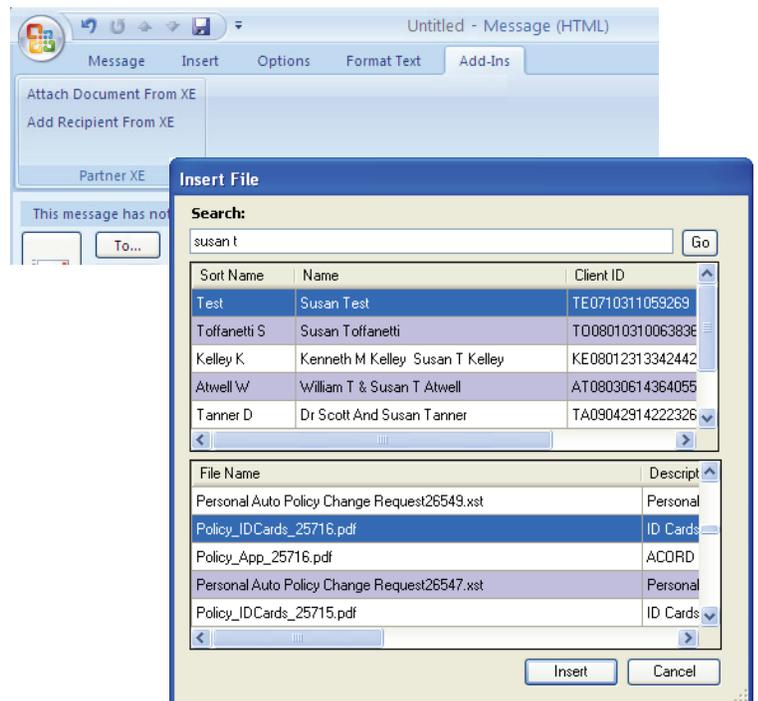
Auto attach: When the user is connected to XE, any incoming email that contains a matching email address within a Client Profile will automatically be stored to that Client Profile Documents section. For simplicity, the email subject line will double as the document description and file name within XE. When you double click to open it, your saved email will open directly in Outlook. Should you reply to the email, your response will also automatically be stored in Partner XE's Documents section.

Manual attach: You may receive an email from a carrier, or other related party, that you would like to attach to a particular client profile. Simply click to highlight the email, then right click to open the menu. At the bottom of the menu is the option to "Add to XE (Search)".

Composing Emails: When composing a new email in Outlook, an additional menu item Add-Ins has been included which includes the features **Attach Document from XE** and **Add Recipient from XE**.

- Attach Document from XE –allows you to attach a document stored in Partner XE to an Outlook email.
- Add Recipient from XE – allows you to search for email addresses assigned to a Partner XE client.

On the Microsoft Outlook Menu, there is an option for Partner XE Settings to allow the user to turn off the Email and Calendar options. To access the Partner XE settings, click on Partner XE on the menu bar, click options. The Partner XE settings popup will appear. A checked box will enable the setting, and unchecked box will disable the setting.



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