



Insure Add-In *Quick Guide*

**THE BUSINESS TECHNOLOGY
SOLUTION YOU NEED**

knowledge | innovation | service

Table of Contents

00

Introduction	Error! Bookmark not defined.
Quick Access Menu Options.....	3
Insure Add-in Support Options	4

01

Task Process	Error! Bookmark not defined.
Task Process Flow	5
Step 1: Specify Task Owner	5
Step 2: Specify Task Properties	6
Step 3: Specify Document(s)	7
Step 4: Submit to Complete	8

02

Task Log Process	Error! Bookmark not defined.
Task Log Process Flow	9
Step 1: Specify Task Owner (Optional)	9
Step 2: Search for an existing Task	10
Step 3: Specify Task Log properties	11
Step 4: Specify Documents.....	12
Step 5: Submit to Complete	13

03

Note Process.....	Error! Bookmark not defined.
Note Process Flow	14
Step 1: Specify System Area and Owner	14
Step 2: Specify Note Properties	15
Step 3: Submit to Complete	16

04

Document Process Error! Bookmark not defined.

Document Process Flow 17

Step 1: Specify System Area and Owner 17

Step 2: Specify Document Properties 18

Step 3: Submit to Complete 19

05

Attachment Process Error! Bookmark not defined.

Attachment Process Flow 20

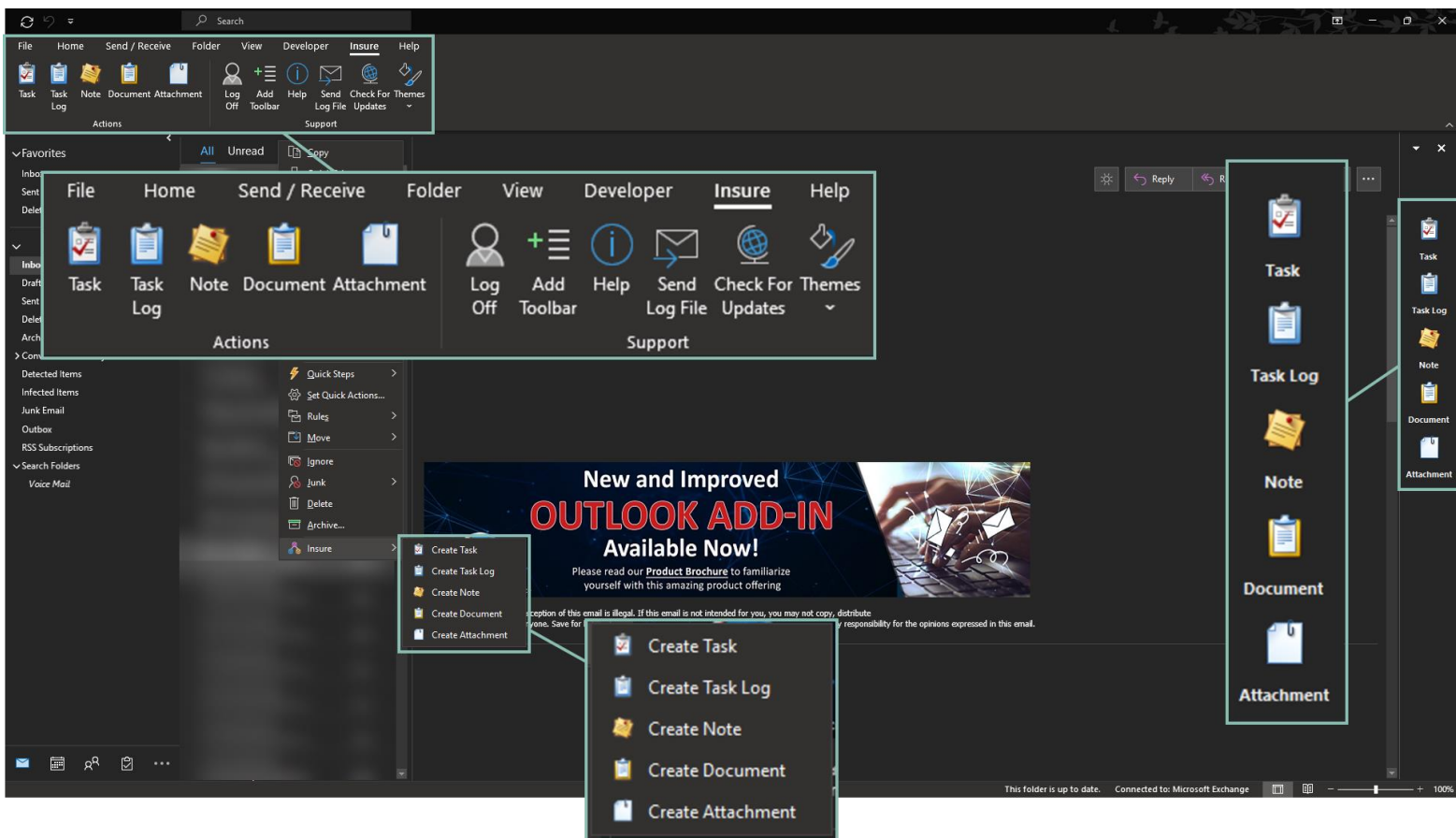
Step 1: Specify Task 20

Step 2: Specify Document Properties 21

Step 3: Submit to Complete 22

The new **Insure Add-in** tool was redesigned to speed up each process, providing the ability for a user to work more efficiently and effectively while still getting all the necessary information required into the Insure system. This was made possible by revisiting each process to reduce the steps required and providing additional enhancements, such as the introduction of the Quick Access toolbar.

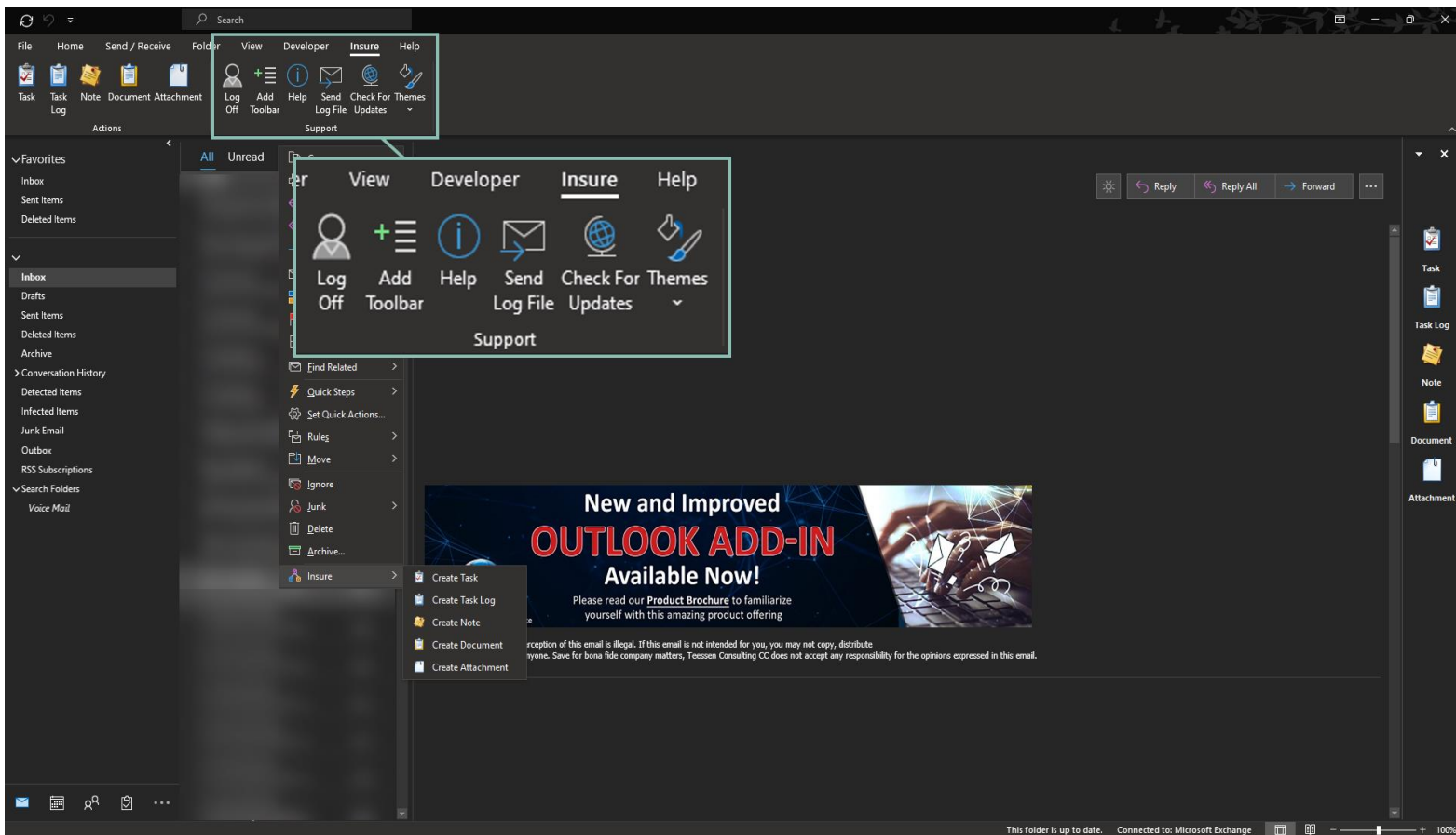
Quick Access Menu Options



Various options to access the Insure Add-in on your Outlook:

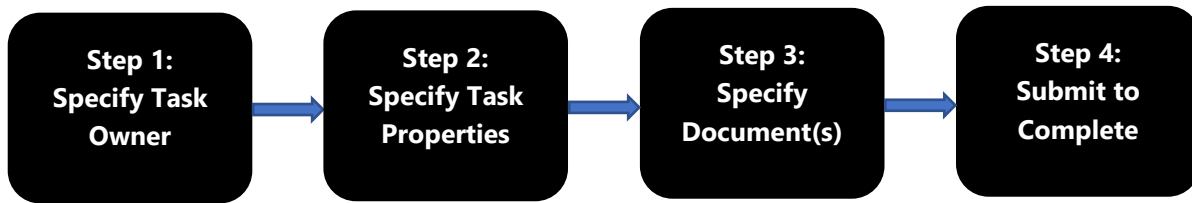
1. Open your email and click the 'Insure' menu item on the toolbar to access the Insure Add-in options.
2. Use the Insure Add-in toolbar on the right side of your email list view.
3. Right click on an email and select the 'Insure' menu item to access the different processes available.

Insure Add-in Support Options



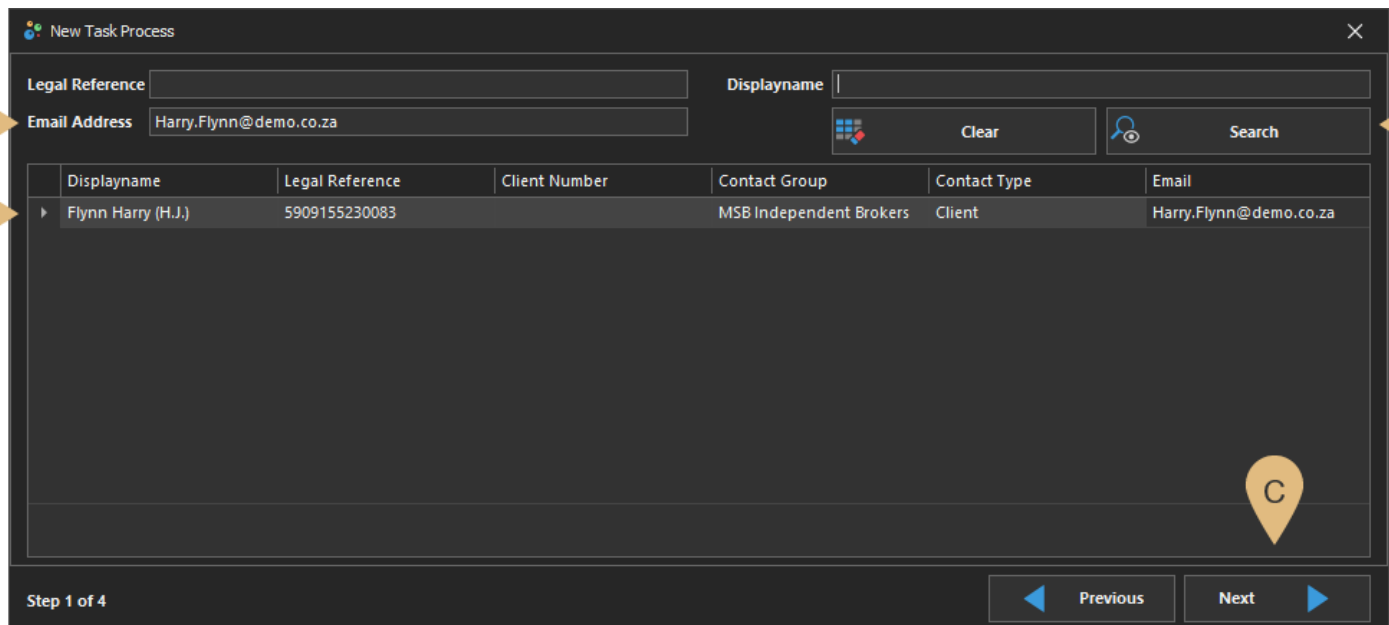
- **Log Off** – to log off from the Insure Add-in service;
- **Add Toolbar** – to re-add the Insure Add-in toolbar to the right side of your Outlook screen;
- **Help** – access the quick user guide;
- **Send Log File** – send log file to support@tconsult.co.za in the event of an error occurring;
- **Check For Updates** – update your Insure Add-in regularly when there is a new release;
- **Themes** – personalize your Insure Add-in by selecting theme

Task Process Flow



Step 1: Specify Task Owner

The system will return a maximum of 20 records matching your search criteria.



New Task Process

Legal Reference Displayname

Email Address

Displayname	Legal Reference	Client Number	Contact Group	Contact Type	Email
Flynn Harry (H.J.)	5909155230083		MSB Independent Brokers	Client	Harry.Flynn@demo.co.za

Step 1 of 4

A: The Email Address field is auto populated by default using the from address of the currently selected email. Furthermore, if the Email Address field is not empty, an automatic search will occur for the contact when starting the Task Process.

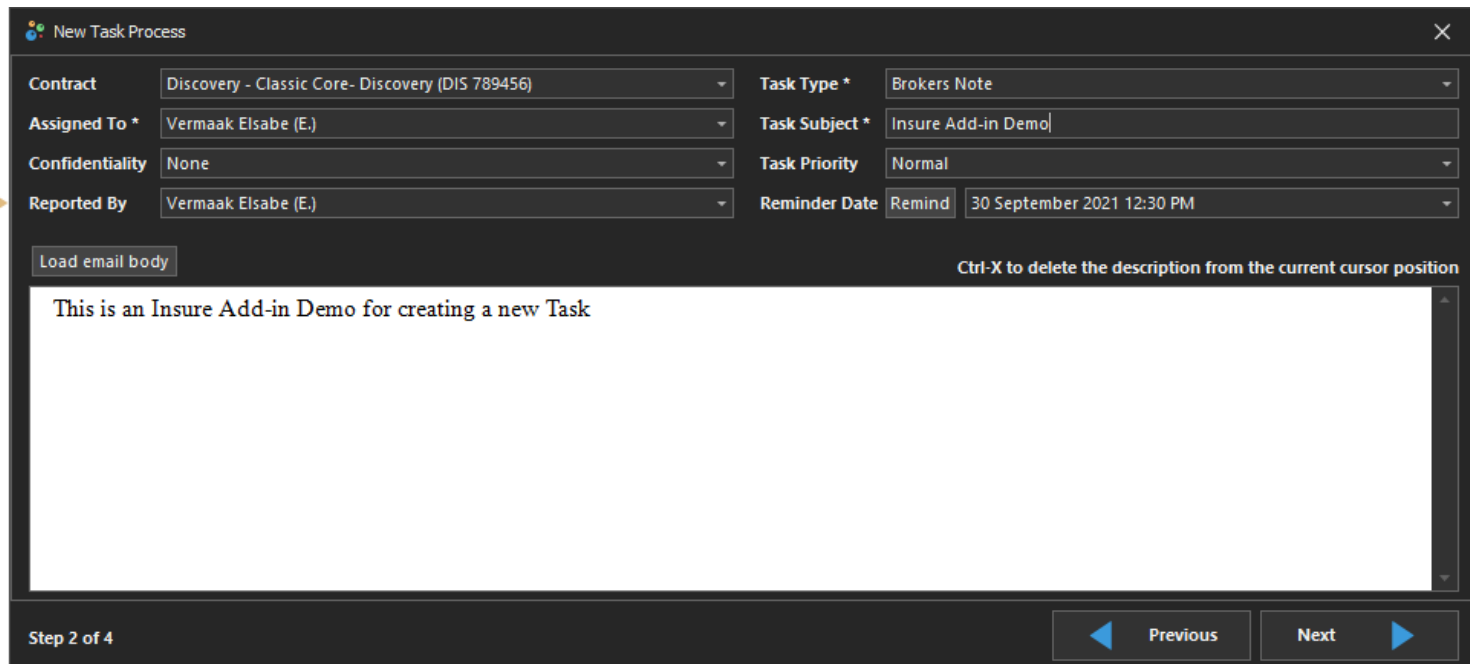
B: The results of the search will be displayed in the list view and will always automatically select the first row.

C: After a record is found, the user just needs to click the “Next” button if the first value in the list view is correct.

D: If a user desires to find a different contact, they can supply the Legal Reference for the most accurate results, Displayname or Email Address.

Step 2: Specify Task Properties

Select and/or enter all relevant information pertaining to this task.



New Task Process

Contract	Discovery - Classic Core- Discovery (DIS 789456)	Task Type *	Brokers Note
Assigned To *	Vermaak Elsabe (E.)	Task Subject *	Insure Add-in Demo
Confidentiality	None	Task Priority	Normal
Reported By	Vermaak Elsabe (E.)	Reminder Date	Remind 30 September 2021 12:30 PM

Ctrl-X to delete the description from the current cursor position

This is an Insure Add-in Demo for creating a new Task

Step 2 of 4

E: The Reported By contact will be automatically searched using the from address of the selected email. If a record is found, it will be displayed in the Reported By field. However, if the Reported By is incorrect, a user can change it by clicking on the field.

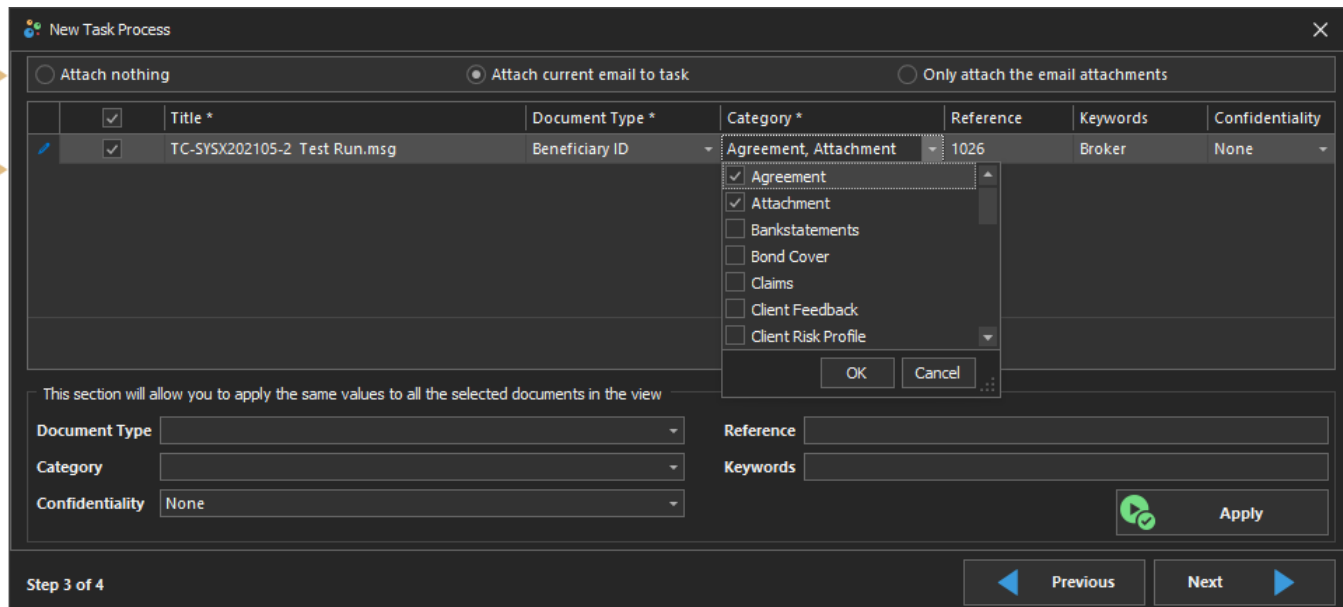
The user will be presented with a form and have an option to search for the correct Reported By record by supplying either a Name, Email Address or Cell Number.

The results will be displayed in a list view and a user will be able to select the desired record and click the "OK" button.

NOTE: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body from the current cursor position.

Step 3: Specify Document(s)

Specify what type of attachment you want to create on the task.



F ☐ Attach nothing ☒ Attach current email to task ☐ Only attach the email attachments

	<input checked="" type="checkbox"/>	Title *	Document Type *	Category *	Reference	Keywords	Confidentiality
	<input checked="" type="checkbox"/>	TC-SYSX202105-2 Test Run.msg	Beneficiary ID	Agreement, Attachment	1026	Broker	None

G

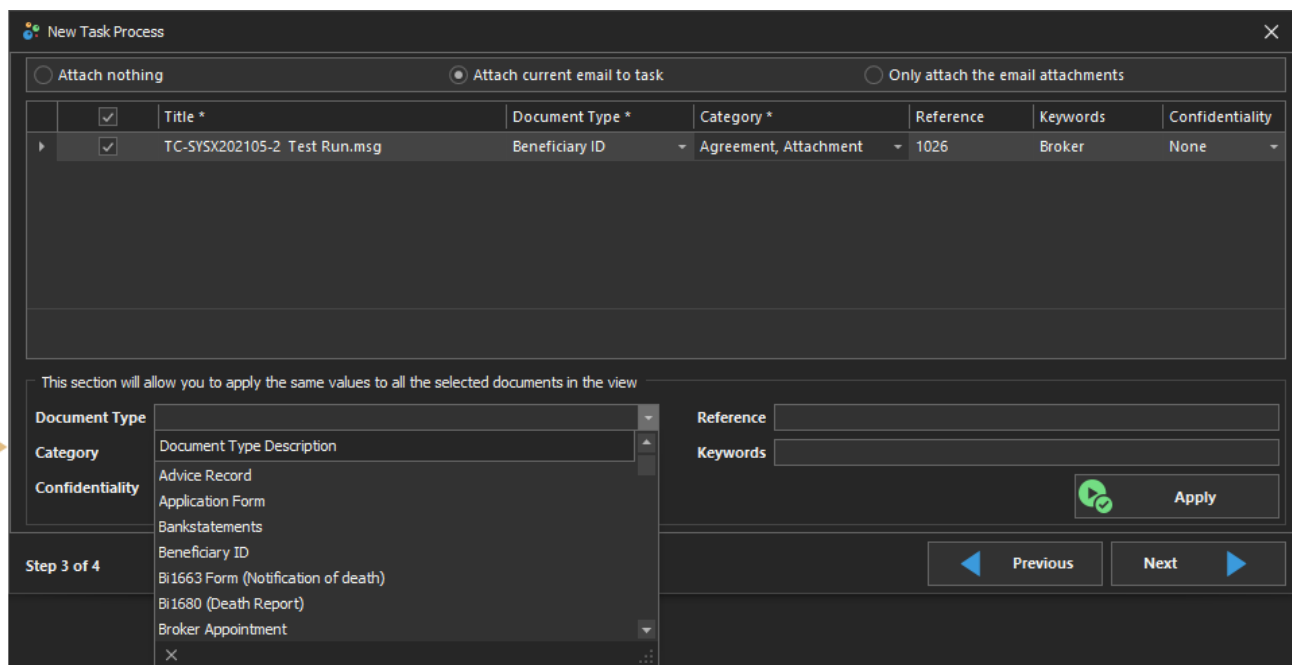
This section will allow you to apply the same values to all the selected documents in the view

Document Type Reference
 Category Keywords
 Confidentiality

Step 3 of 4

F: Attach nothing will ensure that no attachments are created on the newly created task. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the newly created task.

G: In the document list view, select the documents you wish to attach to the task. You can edit the values of the documents by using the inline editing option on the list view.



H

This section will allow you to apply the same values to all the selected documents in the view

Document Type Reference
 Category Keywords
 Confidentiality

Step 3 of 4

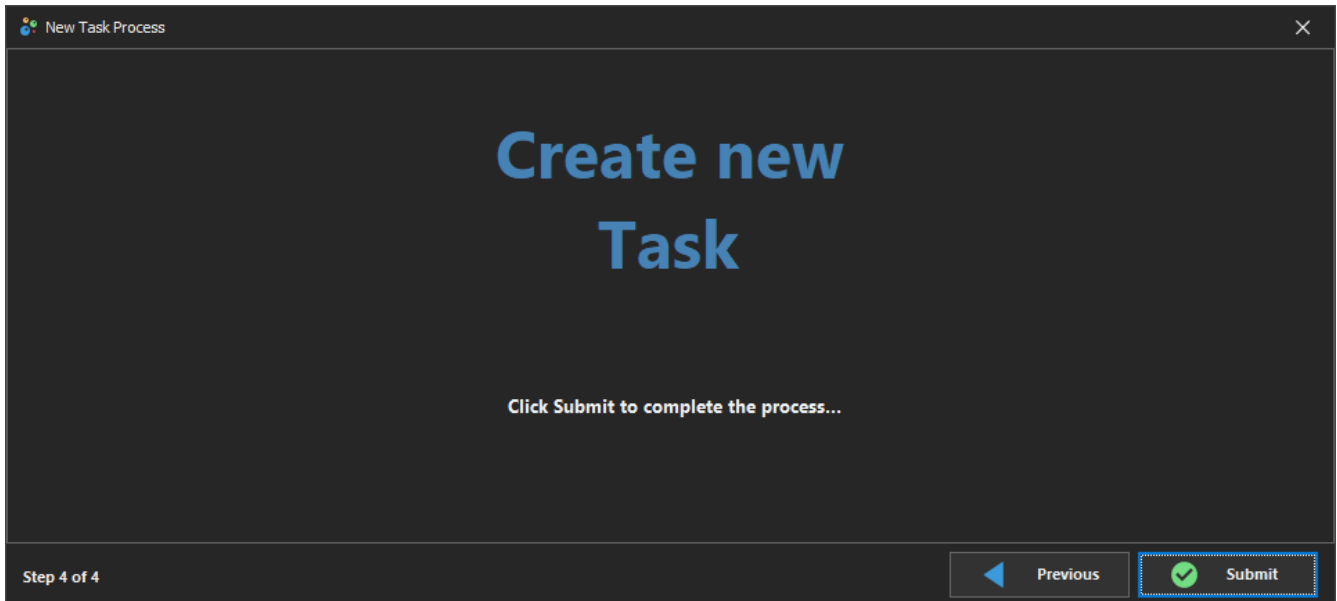
I

H: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

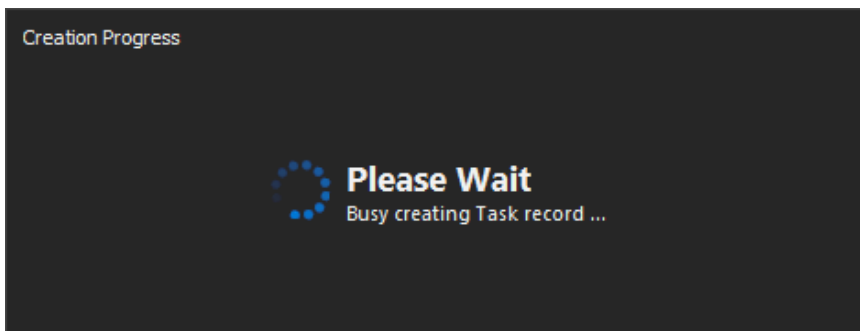
I: Click the “Apply” button to apply the changes to all the selected documents in the list view.

Step 4: Submit to Complete

Click the "Submit" button to create the Task.

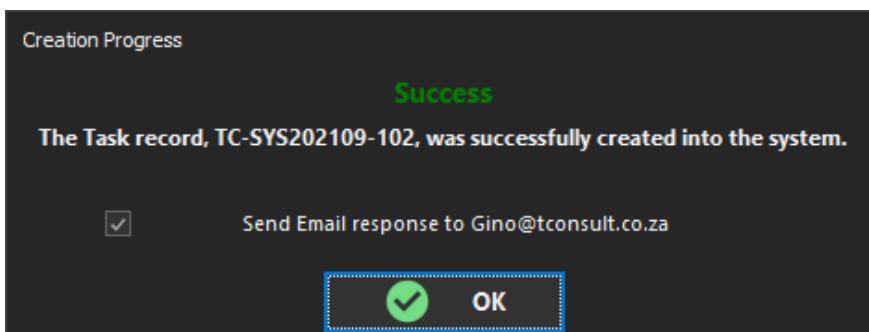


A popup will be displayed indicating the progress.



Once the process is done, a message will be displayed indicating whether the process was successful or not.

A check box will be shown, "Send Email response to", that a user can utilise to send an email once the task has been created.

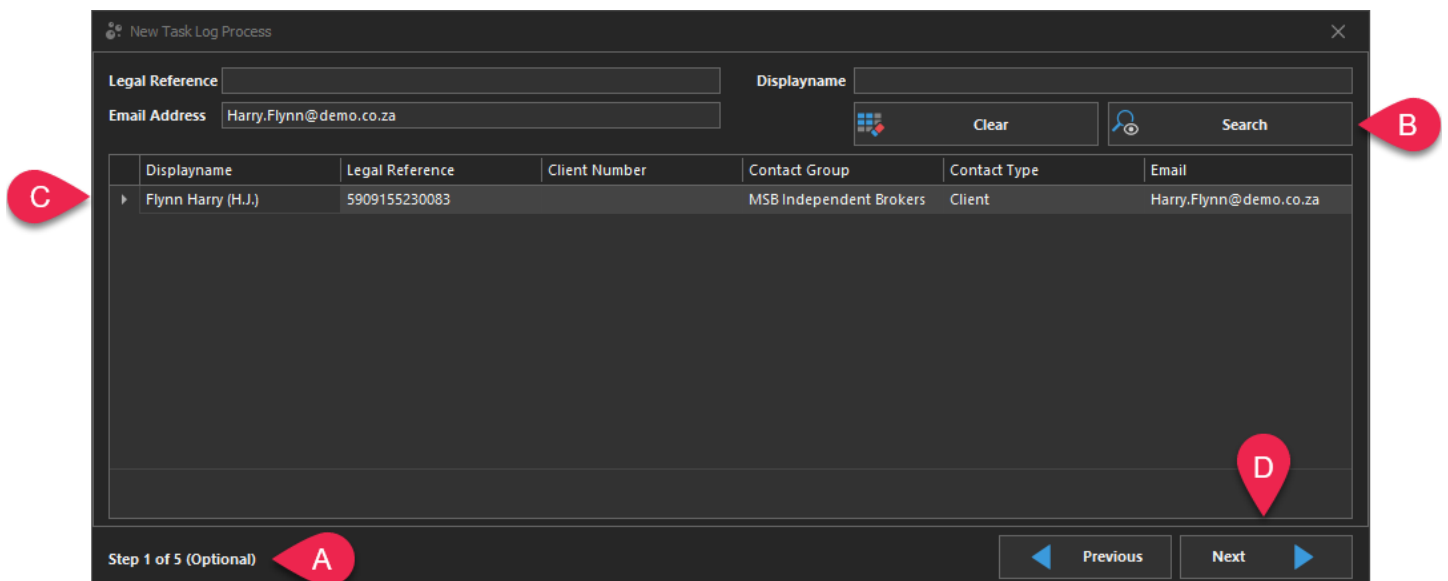


Task Log Process Flow



Step 1: Specify Task Owner (Optional)

The system will return a maximum of 20 records matching your search criteria.



New Task Log Process

Legal Reference: Displayname:

Email Address:

Displayname	Legal Reference	Client Number	Contact Group	Contact Type	Email
Flynn Harry (H.J.)	5909155230083		MSB Independent Brokers	Client	Harry.Flynn@demo.co.za

Step 1 of 5 (Optional)

A: Task Owner is an optional step now for Task Log Step 1. If a user does not want to specify an owner, the user can just click the “Next” button. Additionally, if an owner is not supplied, on Step 2 Task Subject will be disabled, only allowing the user to enter the Task Number.

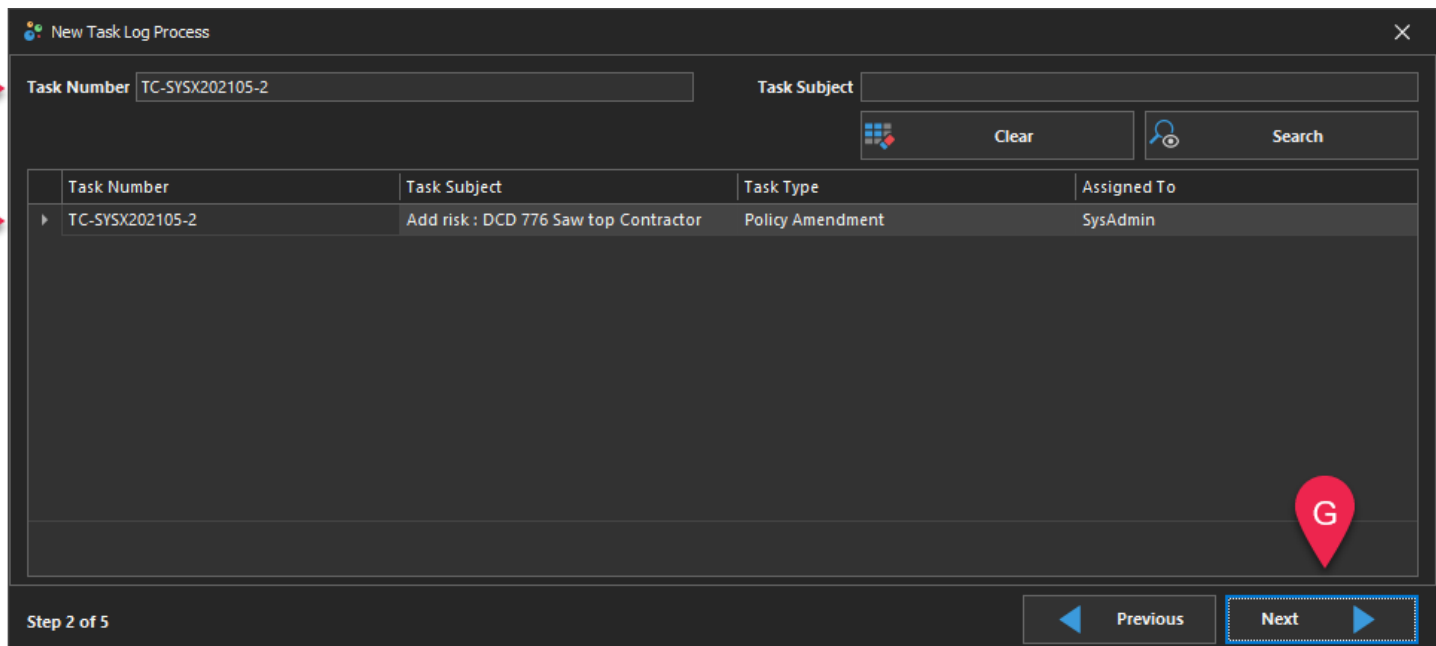
B: If a user desires to find a different contact, they can supply the Legal Reference for the most accurate results, Displayname or Email Address.

C: The results of the search will be displayed in the list view and will always automatically select the first row.

D: The user can click “Next” with or without an Owner being selected.

NOTE: This step is optional.

Step 2: Search for an existing Task



New Task Log Process

Task Number: TC-SYSX202105-2 Task Subject: [Empty]

Clear Search

Task Number	Task Subject	Task Type	Assigned To
TC-SYSX202105-2	Add risk : DCD 776 Saw top Contractor	Policy Amendment	SysAdmin

Step 2 of 5

Previous Next

E: If the selected email contains a Task Number in the email subject, the Task Number will be auto populated in the Task Number field and an auto search will occur.

F: If the task is found, it will be displayed in the list view and automatically selected.

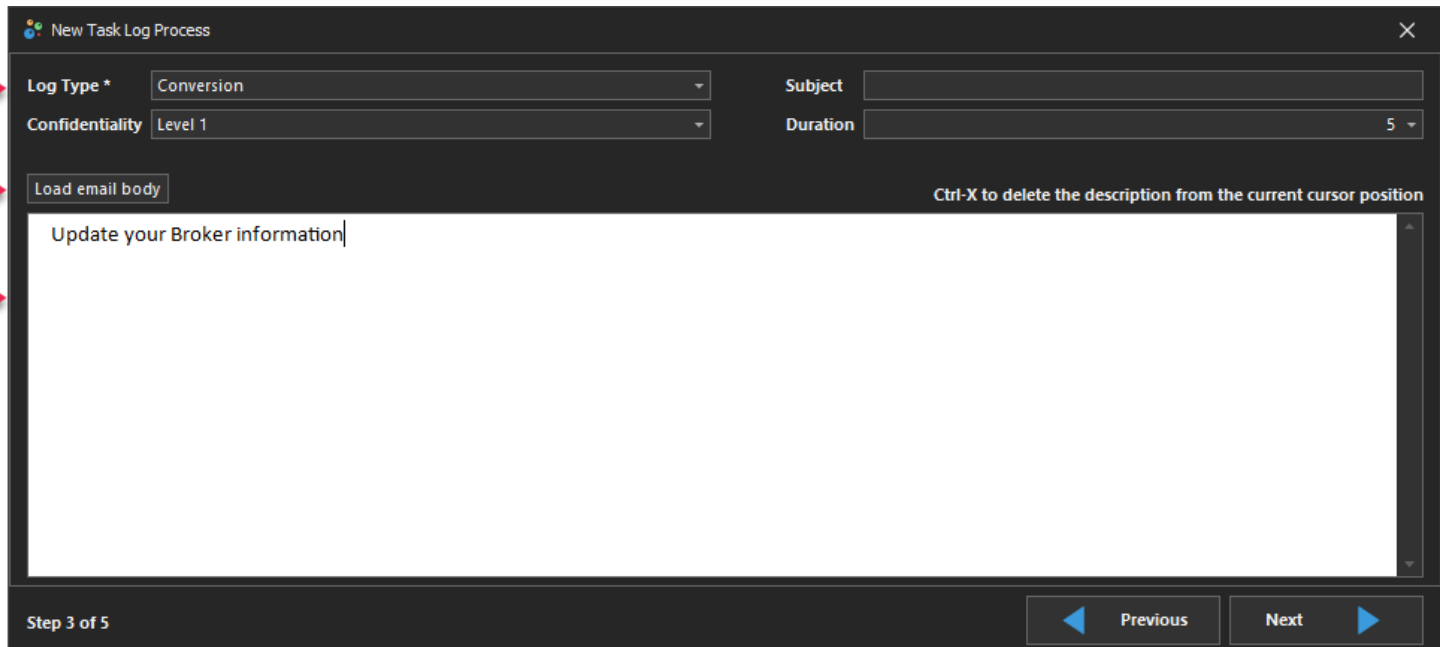
G: The user can click “Next” if the first record displayed in the list view is correct as it will be automatically selected.

NOTE: If an owner was specified in the first step, the first 20 active Task records for the client will be displayed when you search without a Task Number.

Furthermore, if an owner was not specified in the first step, Task Subject field will be automatically disabled in Step 2 of the Task Log process.

Step 3: Specify Task Log properties

A Log Type and Log Description is required to proceed to the next step. The Log description can be specified manually, or the email body can be loaded using the “Load email body” action.



New Task Log Process

Log Type * Conversion Subject

Confidentiality Level 1 Duration 5

Load email body

Ctrl-X to delete the description from the current cursor position

Update your Broker information|

Step 3 of 5 Previous Next

H: Log type is a required field as this determine what type of task log is being created. Please note that you will only see log types that is linked to the team you are currently in.

I: Use the “Load email body” action to load the contents of the email you have currently selected. If you want to remove the email that was loaded, just click the “Load email body” again and it will remove it.

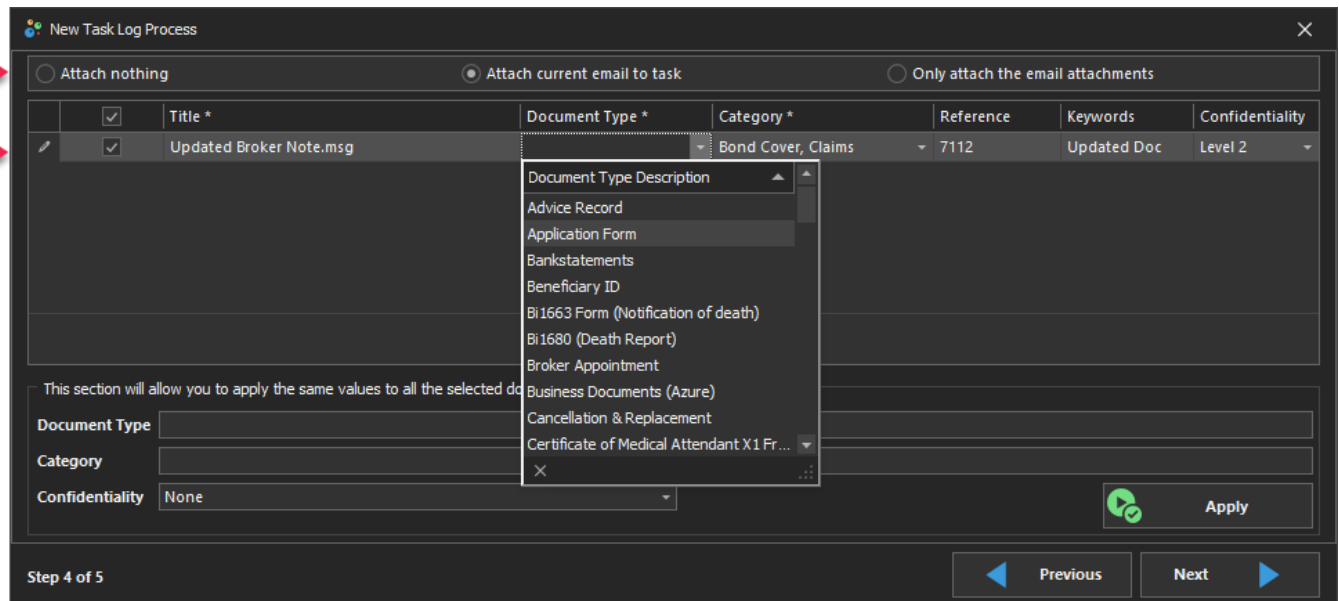
OR

J: Type your own body of the task log.

NOTE: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body/text from the current cursor position.

Step 4: Specify Documents

Specify what type of attachment you want to create when creating the task log.

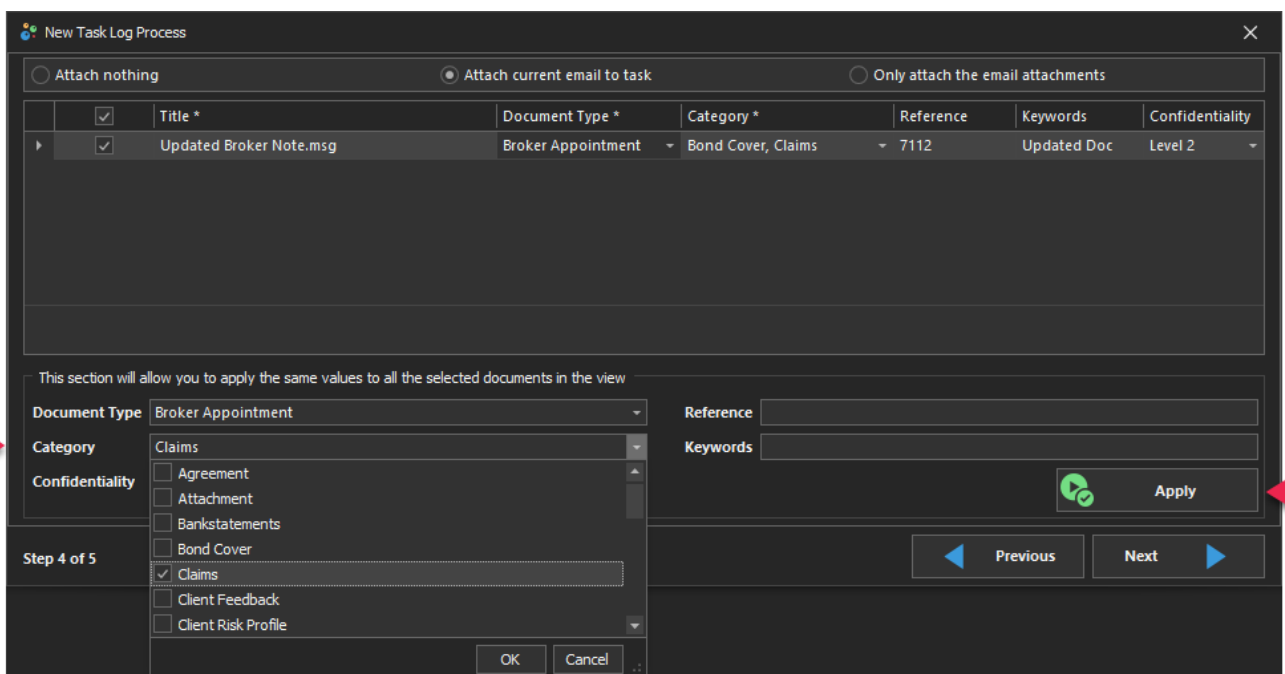


K

L

K: Attach nothing will ensure that no attachments are created on the task where the task log is being created. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the task.

L: In the document list view, select the documents you wish to attach to the task. You can edit the values of the documents by using the inline editing option on the list view.



M

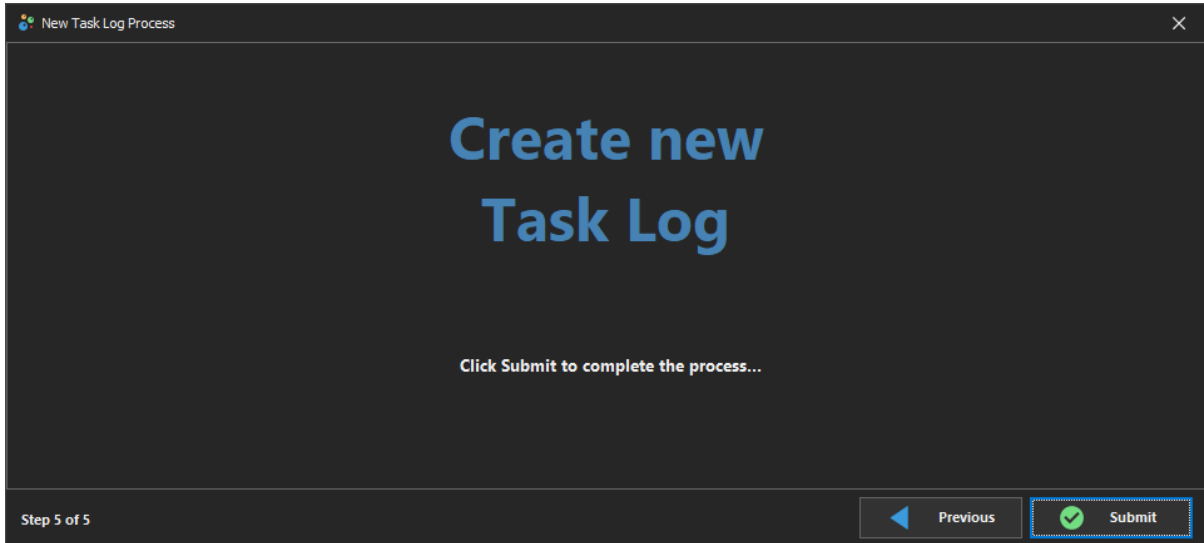
N

M: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

N: Click the "Apply" button to apply the changes to the selected documents in the list view.

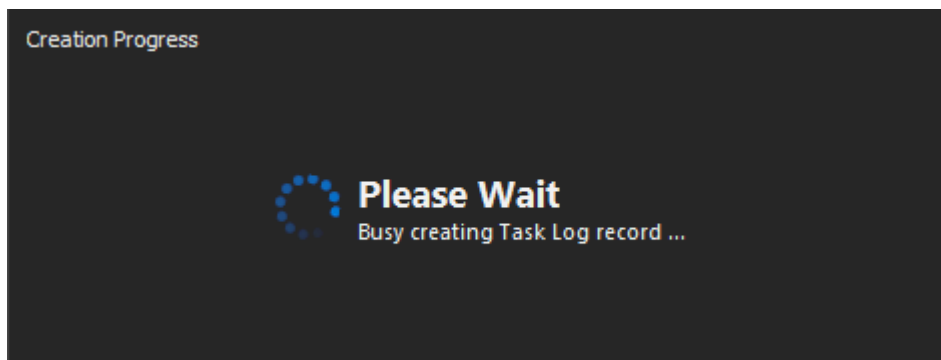
Step 5: Submit to Complete

Click the "Submit" button to create the Task Log.



The screenshot shows a window titled "New Task Log Process" with a close button (X) in the top right corner. The main content area has a dark background with the text "Create new Task Log" in large, bold, blue letters. Below this, in smaller white text, it says "Click Submit to complete the process...". At the bottom left, it says "Step 5 of 5". At the bottom right, there are two buttons: "Previous" with a left arrow and "Submit" with a green checkmark. The "Submit" button is highlighted with a blue dashed border.

A popup will be displayed indicating the progress.



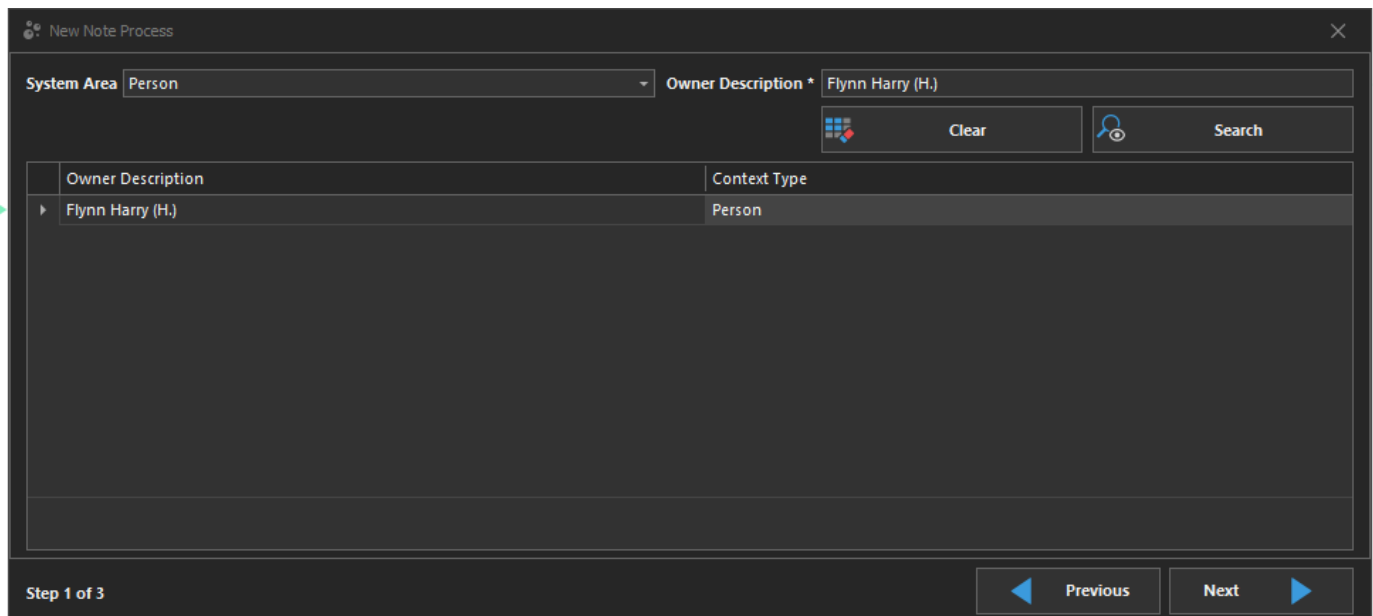
Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.

Note Process Flow



Step 1: Specify System Area and Owner

Search for an owner in a specific System Area.



The screenshot shows the 'New Note Process' window. At the top, there is a 'System Area' dropdown menu set to 'Person' and an 'Owner Description *' text field containing 'Flynn Harry (H.)'. To the right of the text field are 'Clear' and 'Search' buttons. Below this is a table with two columns: 'Owner Description' and 'Context Type'. The first row shows 'Flynn Harry (H.)' under 'Owner Description' and 'Person' under 'Context Type'. The table is highlighted with a green callout 'B'. The bottom of the window shows 'Step 1 of 3' and 'Previous' and 'Next' buttons. A green callout 'A' points to the 'Search' button.

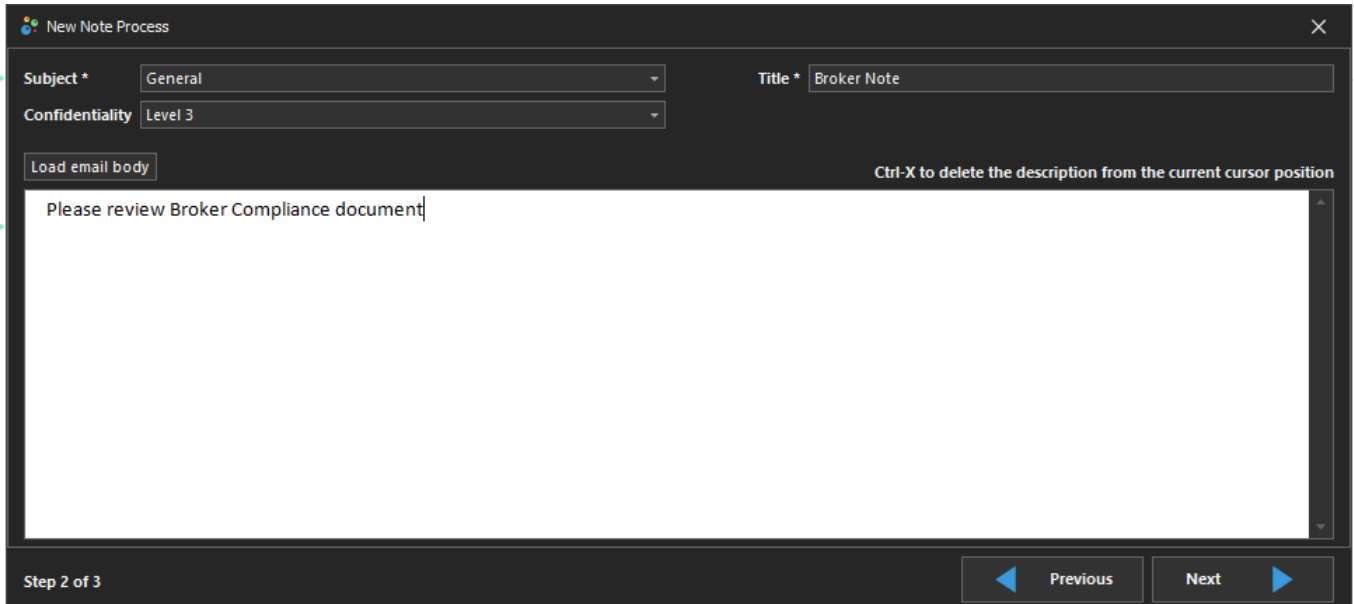
Owner Description	Context Type
Flynn Harry (H.)	Person

A: Search for an Owner in a specific System Area. When doing the search, please start with specifying the Owner's surname.

B: The search result will be displayed in the list view and the first record will be automatically selected for the user.

Step 2: Specify Note Properties

Subject, Title and Note Description are required fields before moving to the next step.



C Subject * General

D Title * Broker Note

Confidentiality Level 3

Load email body

Ctrl-X to delete the description from the current cursor position

Please review Broker Compliance document

Step 2 of 3

Previous Next

C: The “Subject” field is the type of Note you are going to create. You can select a type from the drop-down list of values. These values are the same as in the Insure system.

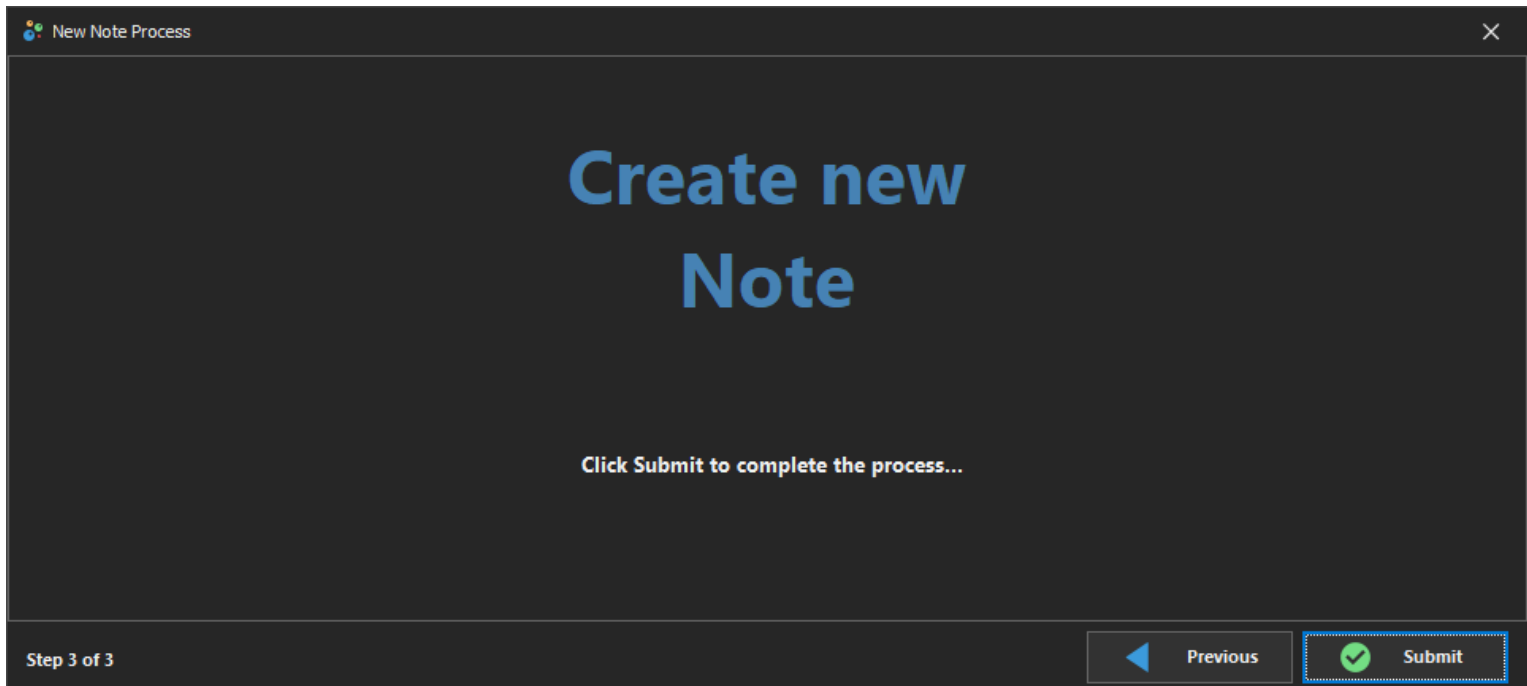
D: Title is a required field.

E: Use the “Load email body” action to load the contents of the email you have currently selected. If you want to remove the email that was loaded, just click the “Load email body” again and it will remove it.

NOTE: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body from the current cursor position.

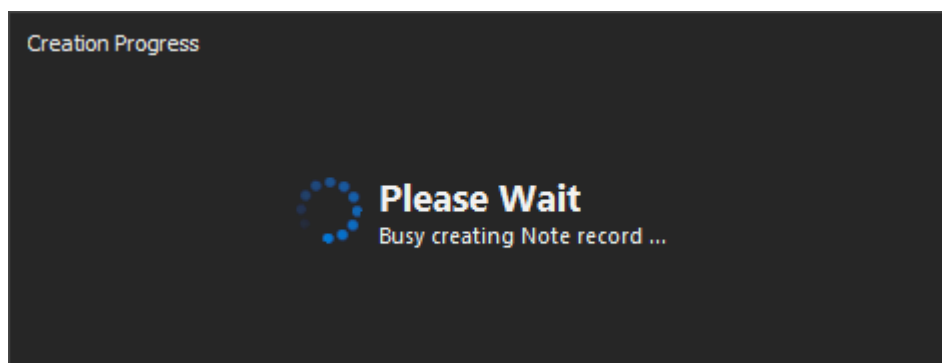
Step 3: Submit to Complete

Click the "Submit" button to create the Note.

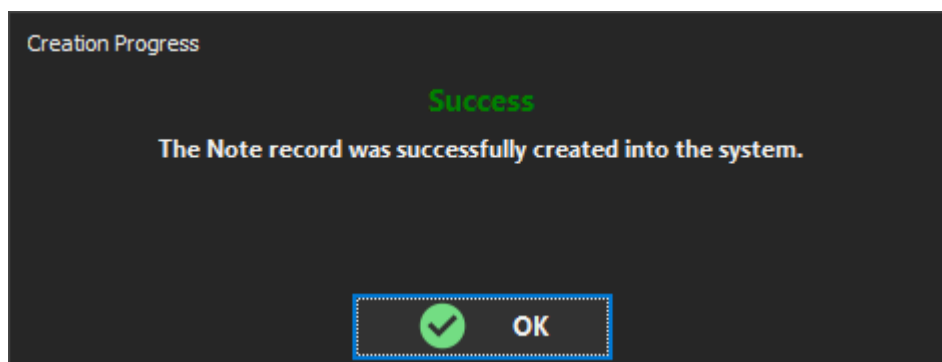


The screenshot shows a window titled "New Note Process" with a close button in the top right corner. The main content area has a dark background with the text "Create new Note" in large blue letters. Below this, it says "Click Submit to complete the process...". At the bottom left, it says "Step 3 of 3". At the bottom right, there are two buttons: "Previous" with a left arrow and "Submit" with a green checkmark icon. The "Submit" button is highlighted with a dashed blue border.

A popup will be displayed indicating the progress.



Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.

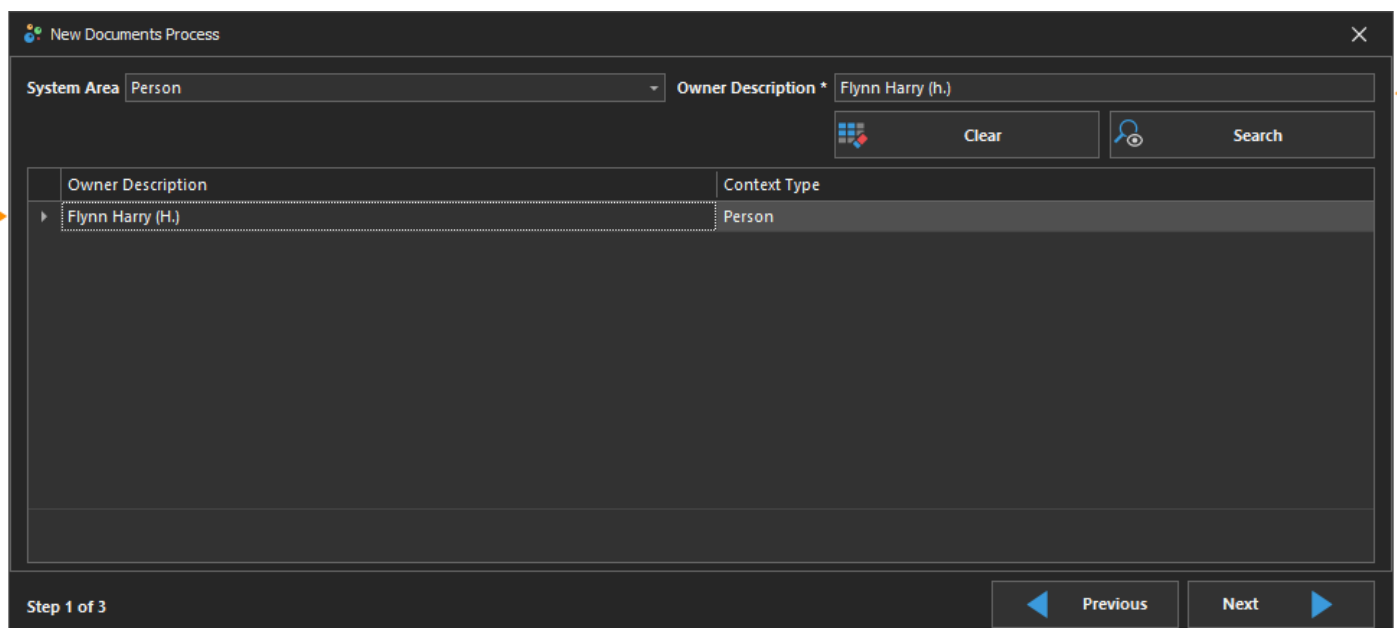


Document Process Flow



Step 1: Specify System Area and Owner

Search for an owner in a specific System Area.



New Documents Process

System Area: Person Owner Description *: Flynn Harry (h.)

Clear Search

Owner Description	Context Type
Flynn Harry (H.)	Person

Step 1 of 3

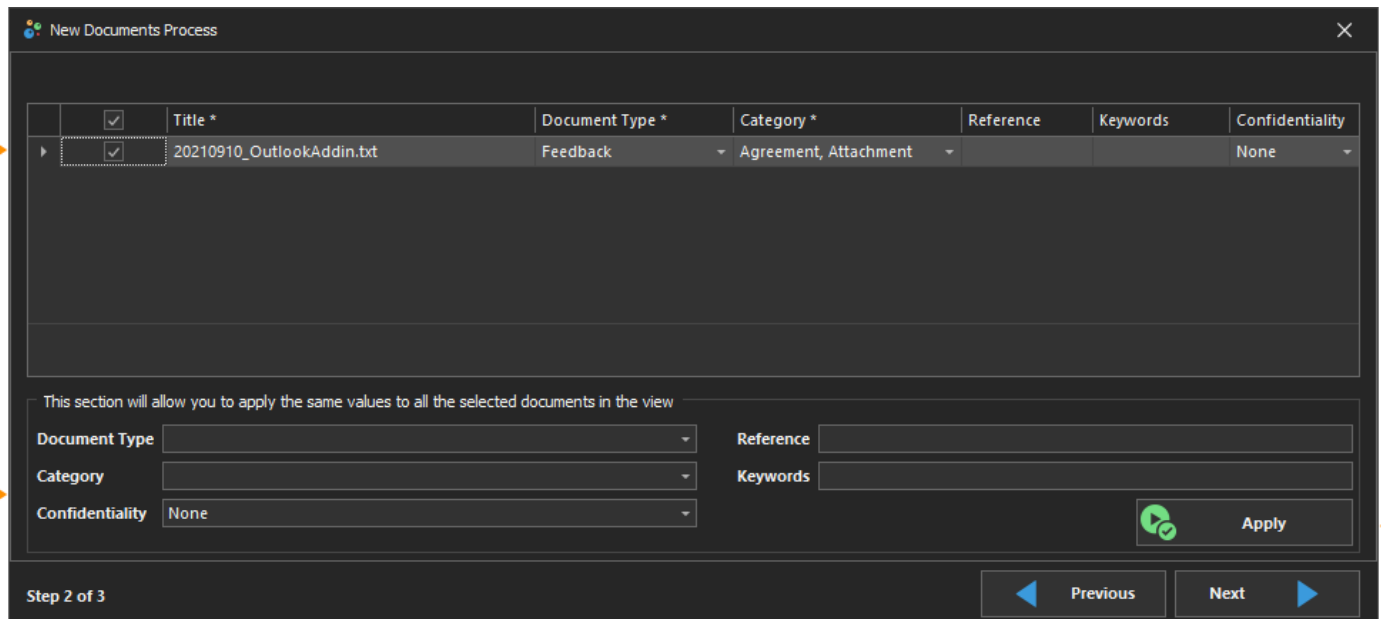
Previous Next

A: Search for an Owner in a specific System Area. When doing the search, please start with specifying the Owner's surname.

B: The search result will be displayed in the list view and the first record will be automatically selected for the user.

Step 2: Specify Document Properties

In the document list view, select the documents you wish to attach to the Document Library.



The screenshot shows a window titled "New Documents Process" with a close button (X) in the top right corner. It contains a table with the following columns: Title *, Document Type *, Category *, Reference, Keywords, and Confidentiality. A single document is listed: "20210910_OutlookAddin.txt" with Document Type "Feedback" and Category "Agreement, Attachment". A checkmark in the first column indicates it is selected. Below the table, a section titled "This section will allow you to apply the same values to all the selected documents in the view" contains input fields for Document Type, Category, Confidentiality, Reference, and Keywords. An "Apply" button with a green checkmark icon is located to the right of these fields. At the bottom, it says "Step 2 of 3" and has "Previous" and "Next" navigation buttons.

	Title *	Document Type *	Category *	Reference	Keywords	Confidentiality
<input checked="" type="checkbox"/>	20210910_OutlookAddin.txt	Feedback	Agreement, Attachment			None

This section will allow you to apply the same values to all the selected documents in the view

Document Type Reference

Category Keywords

Confidentiality

Step 2 of 3

C: You can select which documents you wish to create to the Document Library using the check box. Additionally, you will be able to do inline editing for each Document in the list view.

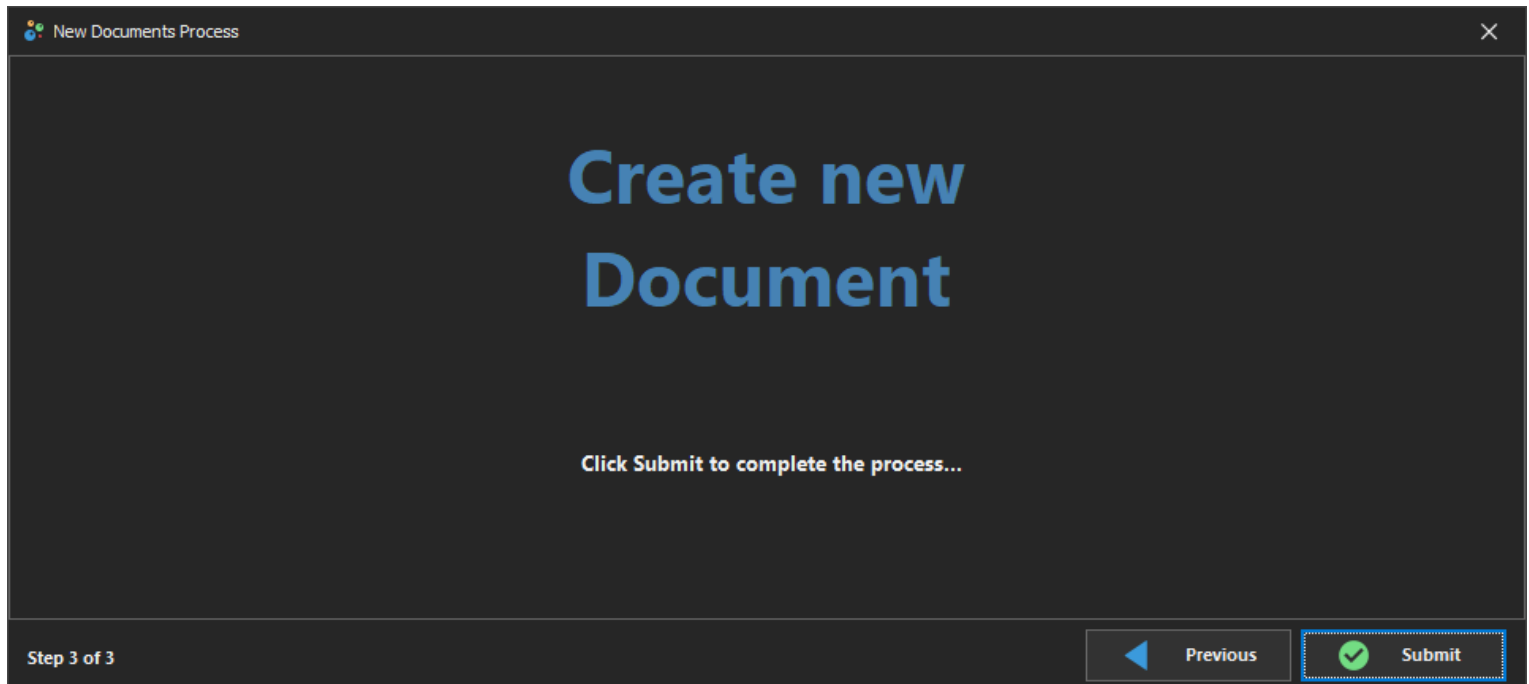
D: Apply changes to all documents selected in the list view, indicated in the check box. This will allow for changes to occur quicker if there are multiple documents that require the same information.

- Document Type
- Category
- Confidentiality
- Reference
- Keywords

E: Click the "Apply" button to apply the changes to all the documents selected in the list view.

Step 3: Submit to Complete

Click the "Submit" button to create the Document(s).



New Documents Process

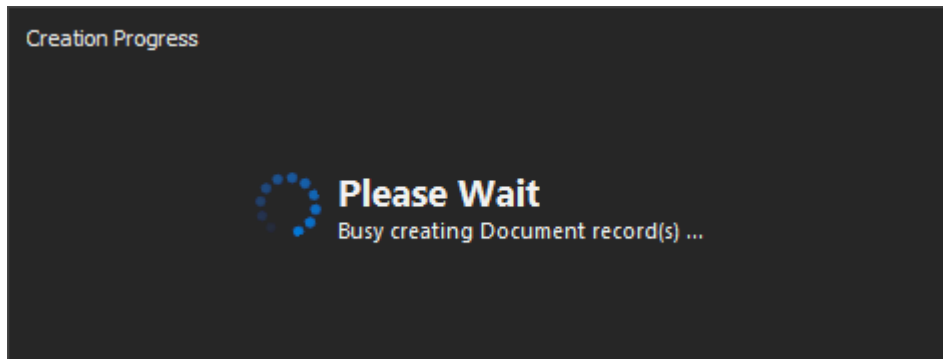
Create new Document

Click Submit to complete the process...

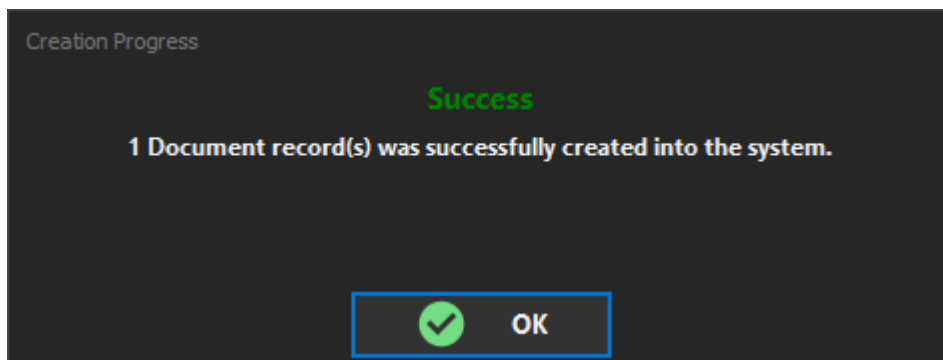
Step 3 of 3

Previous Submit

A popup will be displayed indicating the progress.



Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.

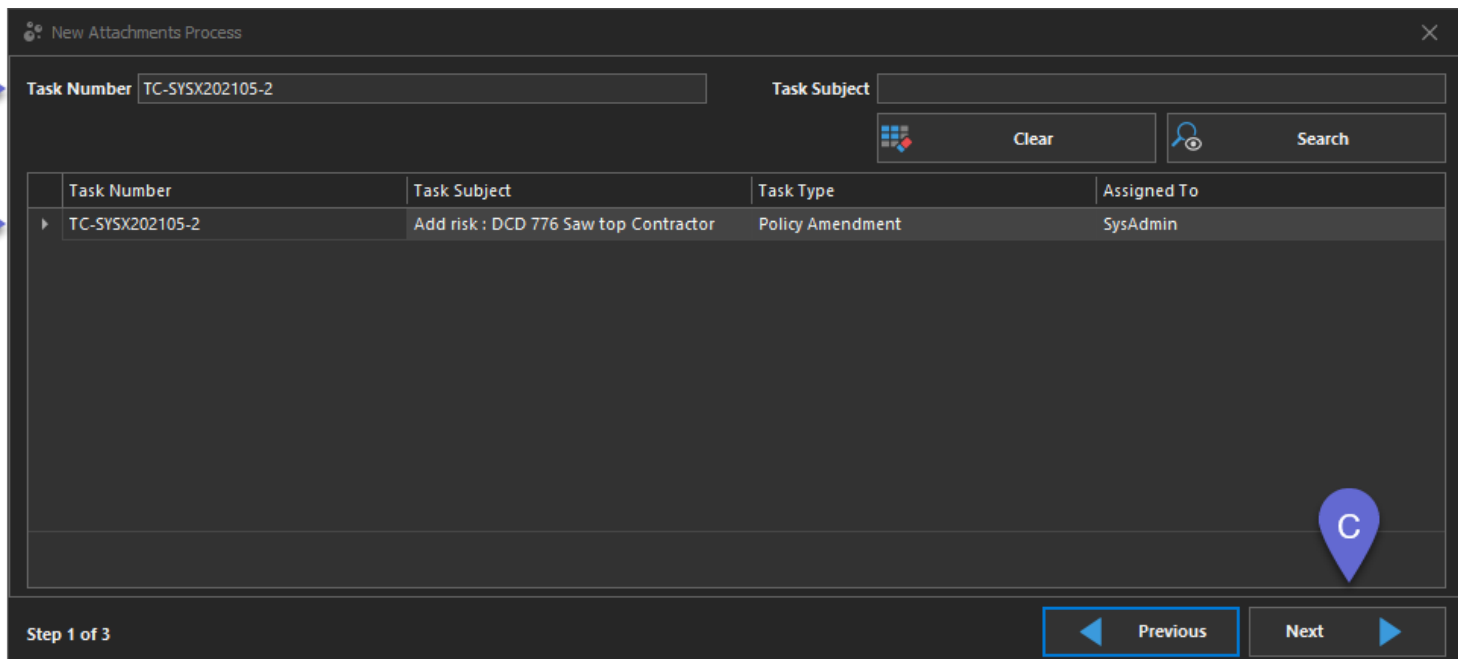


Attachment Process Flow



Step 1: Specify Task

Specify the task by supplying the Task Number or Task Subject.



New Attachments Process

Task Number: TC-SYSX202105-2 Task Subject: [Empty]

Clear Search

Task Number	Task Subject	Task Type	Assigned To
TC-SYSX202105-2	Add risk : DCD 776 Saw top Contractor	Policy Amendment	SysAdmin

Step 1 of 3 Previous Next

A: For a more accurate result, supply the Task Number. However, you are allowed to search based on the Task Subject and a maximum of 20 task records will be returned that contains the specified subject.

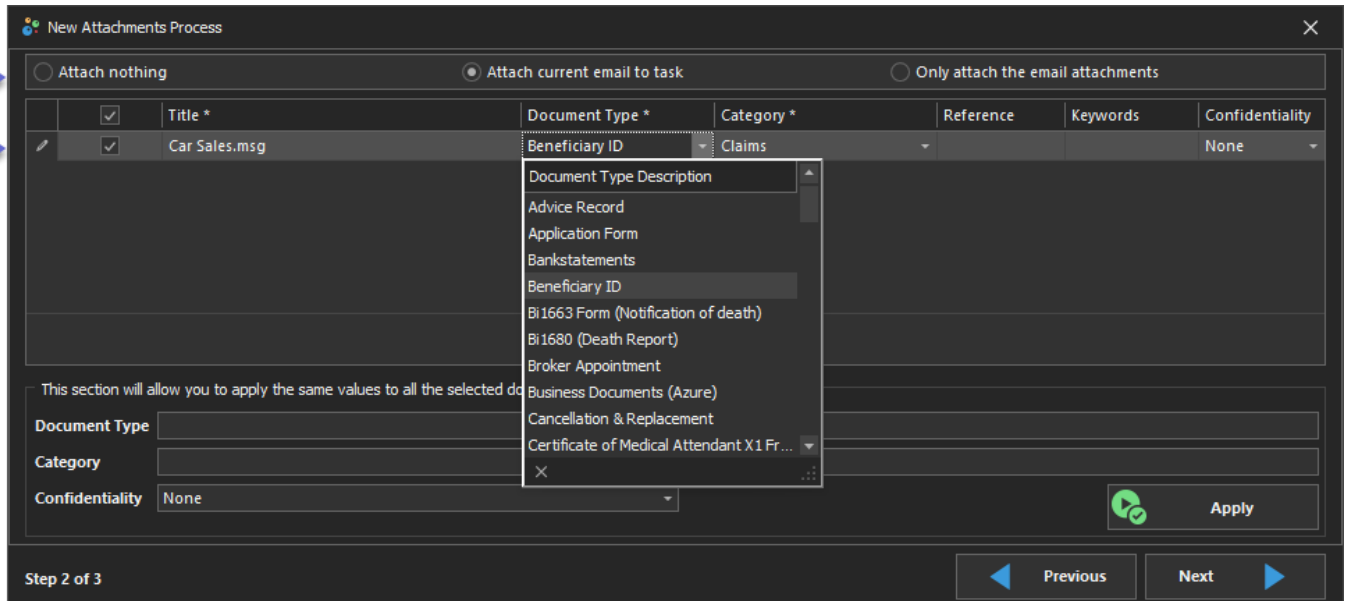
If the selected email contains a Task Number in the email subject, the Task Number will be auto populated in the Task Number field and an auto search will occur.

B: The first record in the list view will be automatically selected for the user, which is why it is very important to be as accurate as possible when searching for the task.

C: Click "Next" if the task record that is automatically selected in the list view is correct.

Step 2: Specify Document Properties

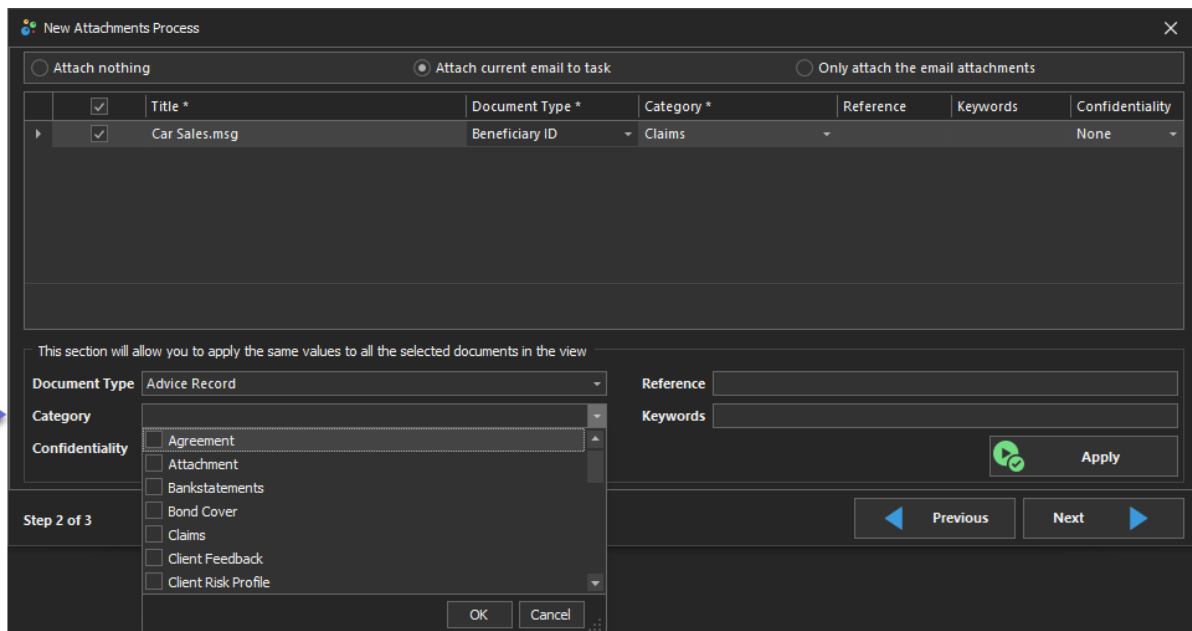
Specify what type of attachment you want to create for a task.



D **E**

D: Attach nothing will ensure that no attachments are created on the task. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the task.

E: In the document list view, select the documents you wish to attach to the task. You can edit the values of the documents by using the inline editing option on the list view.



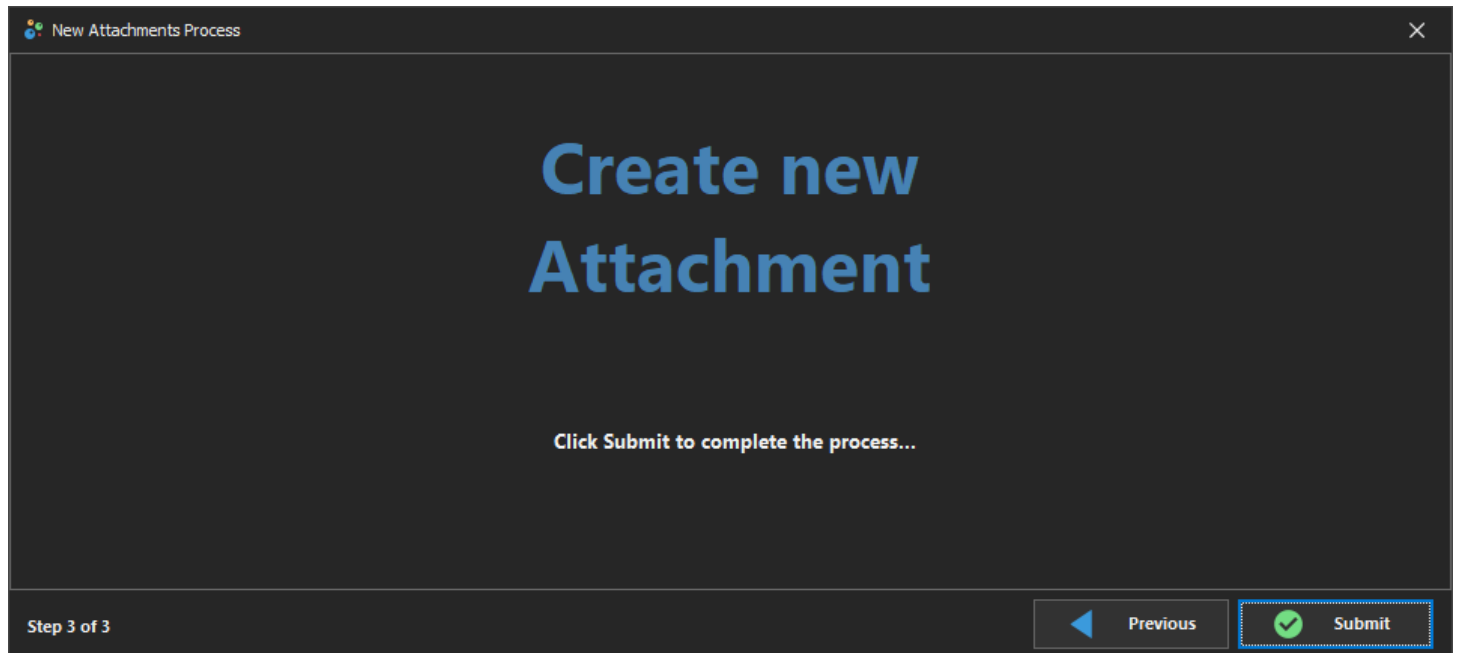
F **G**

F: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

N: Click the “Apply” button to apply the changes to the selected documents in the list view.

Step 3: Submit to Complete

Click the "Submit" button to create the Attachment(s).



New Attachments Process

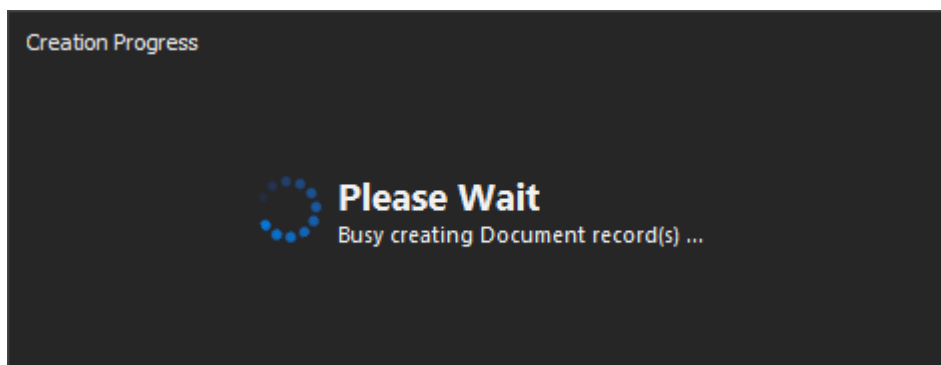
Create new Attachment

Click Submit to complete the process...

Step 3 of 3

Previous Submit

A popup will be displayed indicating the progress.



Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.

