




Clairvoyix MS Outlook Add-In for
OPERA Cloud Sales and Event Management
Users Guide

MS Outlook Add-In Version 1.0
Fall 2022

Introduction

The Clairvoyix MS Outlook Add-In for the OPERA Cloud Sales and Event Management is designed to synchronize certain sales related activities initiated within Microsoft (MS) Outlook with OPERA Cloud Sales and Event Management thereby eliminating many redundant tasks. For example, a property salesperson can utilize the “Synchronize” button in MS Outlook to determine if a contact is new or already existing in OPERA Cloud Sales and Event Management, the salesperson can transfer new meeting planner contacts from MS outlook to OPERA Cloud Sales and Event Management, and the salesperson can log an email to OPERA Cloud Sales and Event Management where it will “attach” to the Contact residing in OPERA Cloud Sales and Event Management thereby providing an “email trail” within OPERA Cloud Sales and Event Management that documents email activity within a given opportunity the salesperson is working. The Synchronize button “acts” on the email currently selected in MS Outlook and will present a window with the status of the email addresses displayed as described later in this document.

The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management utilizes the many benefits of the Oracle Hospitality Integration Platform, or as it is more commonly known “OHIP”. This integration results in a secure, seamless bi-directional transfer of data from MS Outlook and OPERA Cloud Sales and Event Management.

The Clairvoyix MS Outlook Add-In for the OPERA Sales and Event Management is designed to be intuitive and user-friendly. The Add-In is identified by the Clairvoyix blue “gear”  and the word Synchronize.

NOTE – the Clairvoyix MS Outlook Add-In for the OPERA Cloud Sales and Event Management requires the “Clairvoyix OHIP Bridge” to communicate with OPERA Cloud. The Clairvoyix OHIP Bridge is licensed separately and is available from Clairvoyix for a nominal monthly charge.

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The screenshot displays the Microsoft Outlook interface. At the top is the ribbon with tabs for Folder, View, Help, UpMail, and Search. Below the ribbon is a toolbar with various icons for actions like Reply, Forward, Delete, and Move. The main area shows an email thread from Stefanie Piennak to Mike Schmitt and Fabricio Titiro. The email content includes a greeting, a message about copying Fabricio, and a request for help with transaction definitions. A sidebar on the right shows the 'Clairvoyix InBox' with a list of email subjects and senders.

Folder View Help UpMail Search

Reply Delete Archive Reply Reply All Forward Respond Share to Teams Quick Steps Move Tags Groups Search People Address Book Filter Email Find Read Aloud Speech Translate Language Get Add-ins Add-ins Insights Synchronize Clairvoyix

Stefanie Piennak
stefanie.piennak@oracle.com

Results By Date ↑

Three Weeks Ago

Stefanie Piennak
Re: Stay checkouts OHIP
Hi Mike, I am copying Fabricio, as he can explain the 9/2/2021 Inbox

Stefanie Piennak
Re: Outlook integration
Hi Mike, There is nothing really to see, as the sync process 8/30/2021 Inbox

Last Month

Stefanie Piennak
Re: Outlook integration
Hi Mike, Thank you for your update. No need whatsoever for 8/25/2021 Inbox

Stefanie Piennak
Outlook integration
Hi Mike, Hope all is well with you!! Do you have any update 8/04/2021 Hot Stuff

Older

Stefanie Piennak
Re: MS Outlook Plugin - DRAFT Version 1.0 Requirements
Hi Mike, This looks excellent and represents our discussion 7/12/2021 Inbox

Re: Stay checkouts OHIP

Stefan
To: Mike Schmitt, Fabricio Titiro 9/2/2021

Hi Mike,

I am copying Fabricio, as he can explain the definition of transaction and the charge structures better than myself.

Best regards
Stefanie

From: Mike Schmitt
<mike.schmitt@clairvoyix.com>
Sent: Wednesday, September 1, 2021 7:18 PM
To: Stefanie Piennak
<stefanie.piennak@oracle.com>
Subject: [External] : FW: Stay checkouts

Clairvoyix InBox

Subject: Re: Stay checkouts OHIP

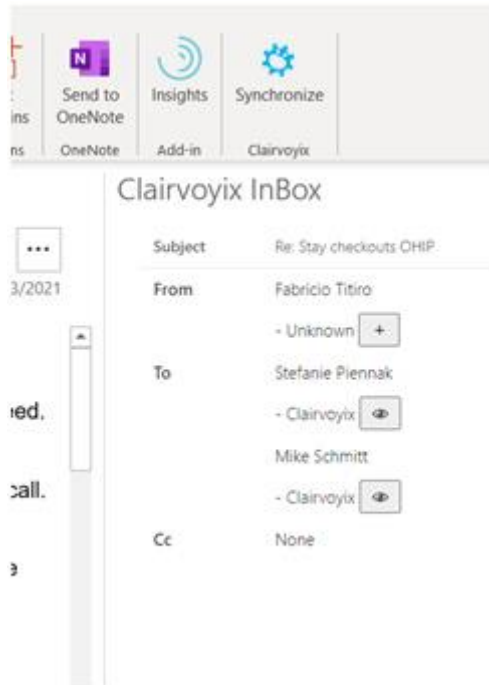
From: Stefanie Piennak
- Unknown


To: Mike Schmitt
- Clairvoyix
Fabricio Titiro
- Unknown


Cc: None

Clicking the MS Outlook Add-In Synchronize button

The Synchronize button is displayed when properly installed in MS Outlook and an email is selected. Clicking on the Synchronize button will instruct the Clairvoyix MS Outlook Add-In to search Contacts in OPERA Cloud Sales and Event Management for all email addresses in the selected email. The Add-In will then display an initial window giving you the status of each email address in the selected email as reported by OPERA Cloud Sales and Event Management.



An “eyeball” icon  is displayed if an email address was found in OPERA Cloud Sales and Event Management, and the available contact information can be viewed by clicking on the eyeball icon.

The “plus” icon  is displayed if the email address is NOT found in OPERA Cloud Sales and Event Management, and a user may add the email address and any associated contact information to OPERA Cloud Sales and Event Management by clicking on the “+” icon.

Displaying “Contacts” the Add-In found in OPERA Cloud Sales and Event Management

The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management will display the contact information as stored in OPERA Cloud Sales and Event Management when the “eyeball” icon is clicked. Contact information includes first and last name, email address, phone number, and the account information (company name and address) as stored in OPERA Cloud Sales and Event Management.

The screenshot displays the Microsoft Outlook interface. At the top, the ribbon includes various tools such as Quick Steps, Move, Tags, Groups, Search People, Address Book, Filter Email, Read Aloud, Translate, Get Add-ins, Insights, and Synchronize. The main content area shows an email titled "Re: Stay checkouts OHIP" from Stefanie Piennak to Mike Schmitt and Fabricio Titiro, dated 9/2/2021. The email body contains a message from Stefanie: "Hi Mike, I am copying Fabricio, as he can explain the definition of transaction and the charge structures better than myself. Best regards Stefanie". To the right of the email, the "Clairvoyix InBox" panel displays the contact information for Stefanie Piennak, including her first and last name, email address (stefanie.piennak@oracle.com), phone number ((239) 963-0582), and account details (Clairvoyix, 2520 St. Rose Parkway Suite 320, NV, 89074, USA). A "Log Email" button is located at the bottom of the contact information panel.

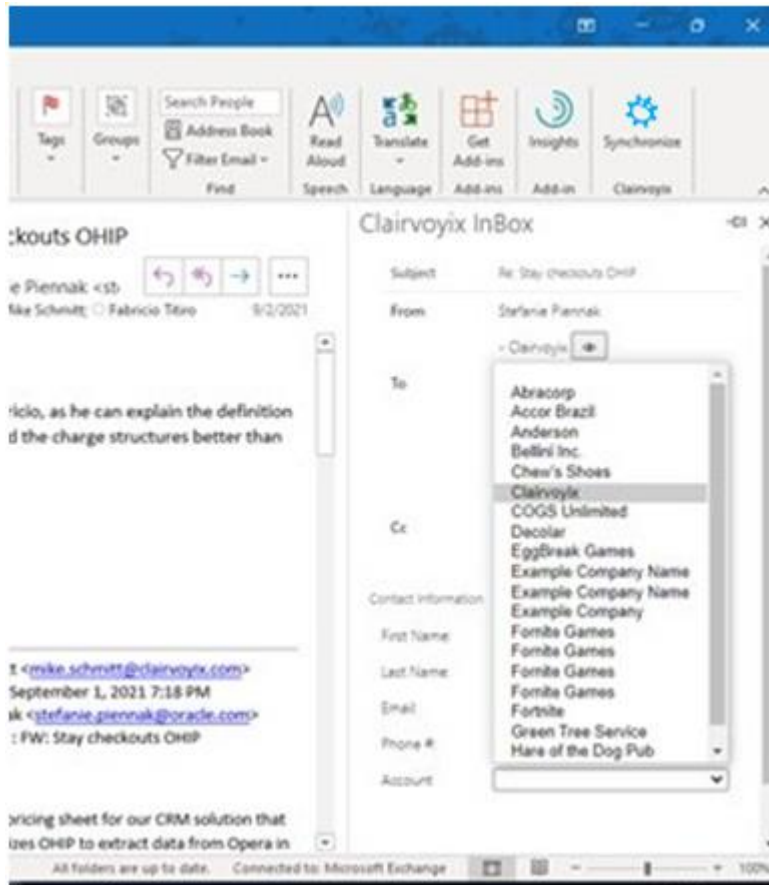
Adding new MS Outlook email addresses to OPERA Cloud Sales and Event Management

The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management can be used to transfer new contact information located in MS Outlook directly to OPERA Cloud Sales and Event Management. By clicking the “+” icon the Add-In will auto-fill the email address, and users of the Add-In can supplement the email address with first name, last name, telephone number and company name. User editable fields are outlined in a “box”, while the company name, or Account in OPERA Cloud Sales and Event Management, features a drop-down box of existing Accounts in OPERA Cloud Sales and Event Management.

The screenshot displays the Microsoft Outlook interface. At the top, a ribbon contains various icons and options: Teams, Quick Steps, Move, Tags, Groups, Search People, Address Book, Filter Email, Read Aloud, Translate, Get Add-ins, Insights, and Synchronize. Below the ribbon, an email is open with the subject "Re: Stay checkouts OHIP" and the sender "Stefanie Piennak". The email body contains a message to Mike Schmitt and Fabricio Titiro. To the right of the email, the "Clairvoyix InBox" add-in is visible, showing contact information for Stefanie Piennak, including fields for First Name, Last Name, Email, Phone #, and Account, along with a Submit button.

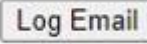
Displaying Accounts found in OPERA Cloud Sales and Event Management

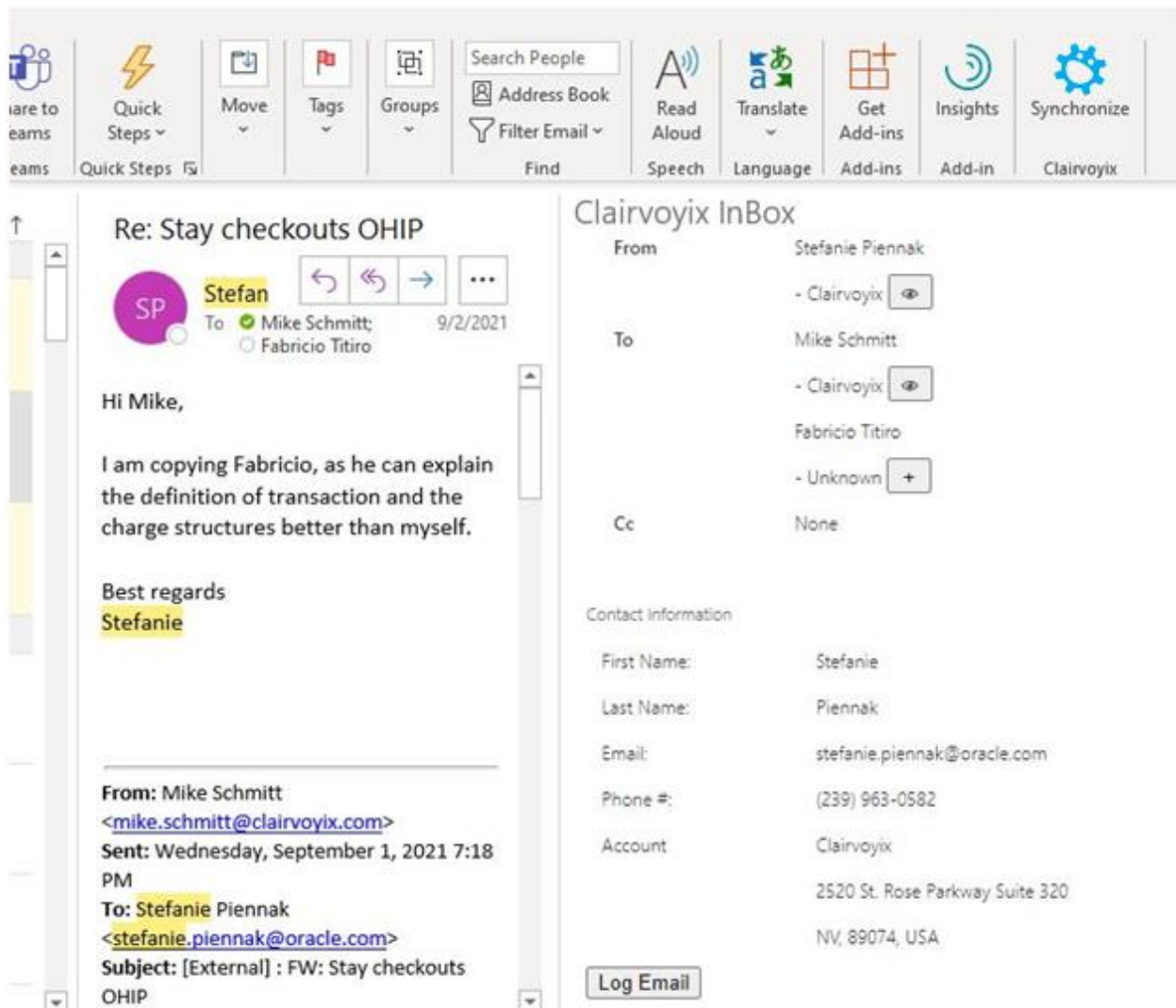
The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management will display the Accounts stored in OPERA Cloud Sales and Event Management when the “+” icon is “clicked” and the Account drop-box is accessed. This will associate the new contact with an existing Account in OPERA Cloud Sales and Event Management.



Log Email Function

The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management gives Outlook users the ability to log or “attach” an email selected from MS Outlook to a Contact stored in OPERA Cloud Sales and Event Management. This creates an opportunity specific email trail within OPERA Cloud Sales and Event Management that a salesperson can utilize for quick reference to historical activity with a given Contact.

When the Outlook user “clicks” the Log Email  button the Clairvoyix MS Outlook Add-In will copy and transfer the currently selected email to OPERA Cloud Sales and Event Management and then “attach” the email to the Contact.



Configuring the Clairvoyix MS Outlook Add-In – First Time Use

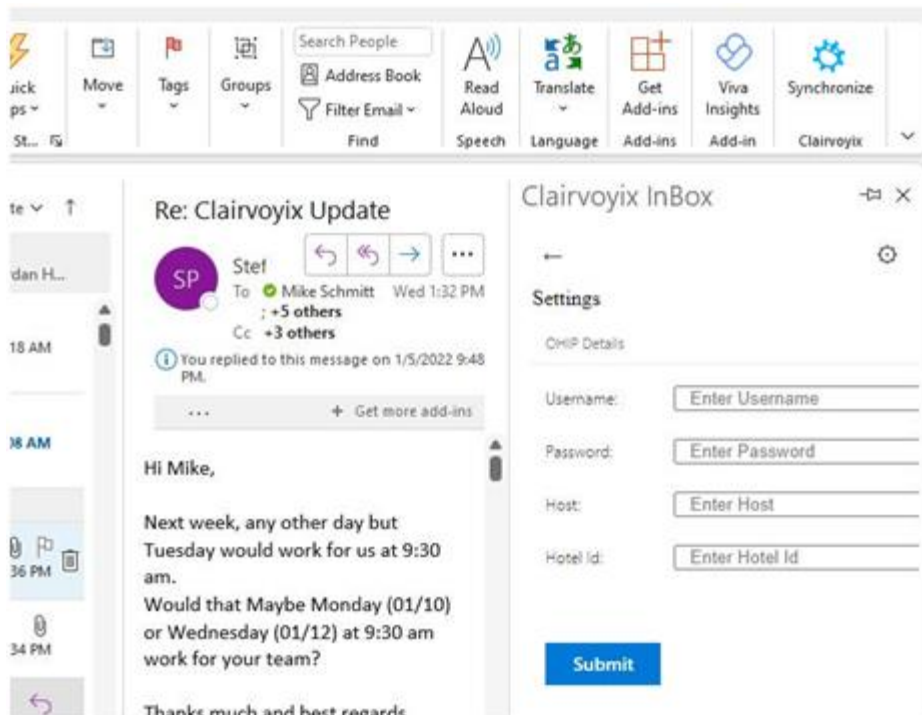
The Clairvoyix MS Outlook Add-In for OPERA Cloud Sales and Event Management is available in the Microsoft “Appsource” as a downloadable Outlook Add-In. Once installed the user must correctly enter the required fields to properly enable the MS Outlook Add-In. The required fields are as follows:

Username – the user’s unique username they are assigned to login to OPERA Cloud Sales and Event Management

Password – the user’s unique password they are assigned to login to OPERA Cloud Sales and Event Management

Host – the URL that “points” to the OPERA Cloud Sales and Event Management the user will communicate with

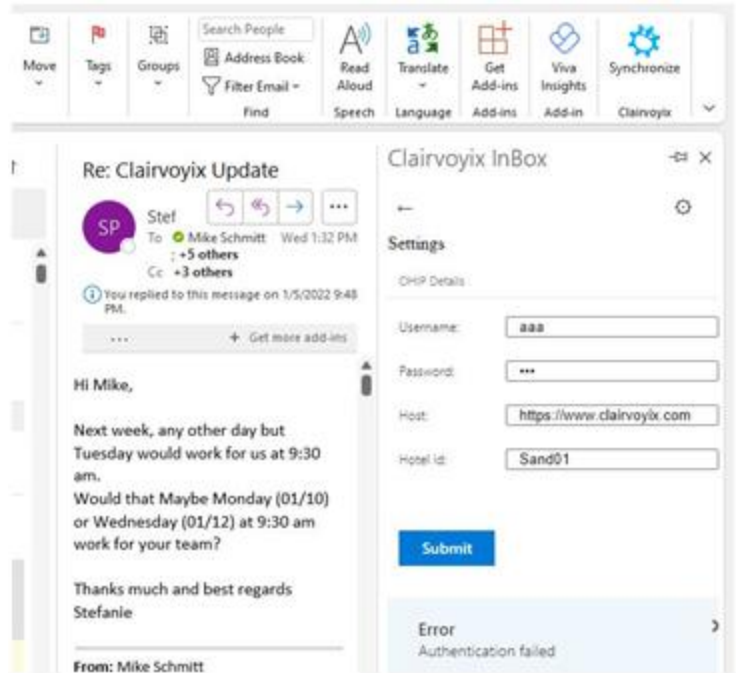
Hotel ID – the hotel property ID known to the “host” OPERA Cloud Sales and Event Management



Configuring the Clairvoyix MS Outlook Add-In – First Time Use (continued)

Once the user has entered the required fields they simply click on the “SUBMIT” button at the bottom of the form.

The following message will be displayed if any of the login credentials are not valid.



Once the user has successfully entered the OPERA Cloud Sales and Event Management Settings the following message will be displayed.

