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PracticeMaster
Outlook Plug-in Quick Guide

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**PracticeMaster Outlook Plug-in Quick Guide**

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Quick Guide to the Outlook Plug-in

The Outlook Plug-in is the perfect tool for PracticeMaster users who want to work in Outlook for email purposes. The Outlook Plug-in provides a means of tracking all case-related and business emails in a centralized location while still using Outlook. This guide will tell you everything you need to know about using the Outlook Plug-in!

Getting Started

Typically, the Outlook Plug-in is installed simultaneously with PracticeMaster. Therefore, the first thing you need to do is check if the Outlook Plug-in has already been installed. Open Outlook to see if there is a PracticeMaster tab on the Outlook ribbon.
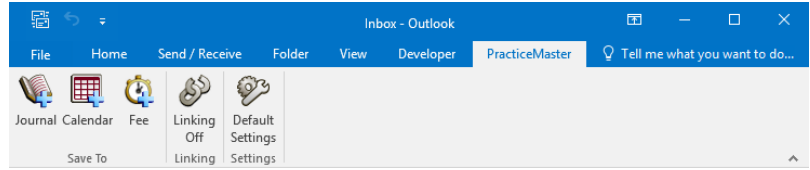
How to Install the Outlook Plug-in

To install the Outlook Plug-in, open PracticeMaster. In the Quick Launch, search for and select "Toolbar Plug-ins." On the **Outlook** tab, click the **Install Outlook Plug-in** button. Once the Outlook Plug-in is installed, restart Outlook.

Using the Outlook Plug-in

Once installed, the Outlook Plug-in will be available as a tab on the ribbon in Outlook. The plug-in will allow you to save any email message in Outlook to PracticeMaster, whether it is a received message or a sent message. These email messages can be saved as Journal records, Calendar records, and Fee records.
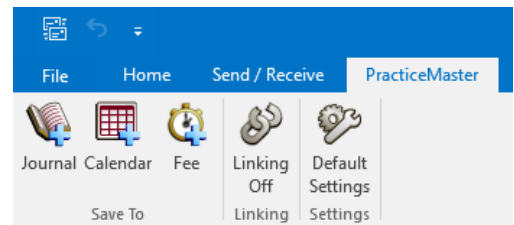
Received Email Messages: Journal Button

To create a PracticeMaster journal record from a received email, all you have to do is select or open the email message and click the **PM Journal** button. This will open a Create PracticeMaster Journal Record window with the information from the email already filled in, as shown on the right. If you would like to save any attachments as Document Management records, select the **Create Document Management record for each attachment** check box before clicking **Save**.
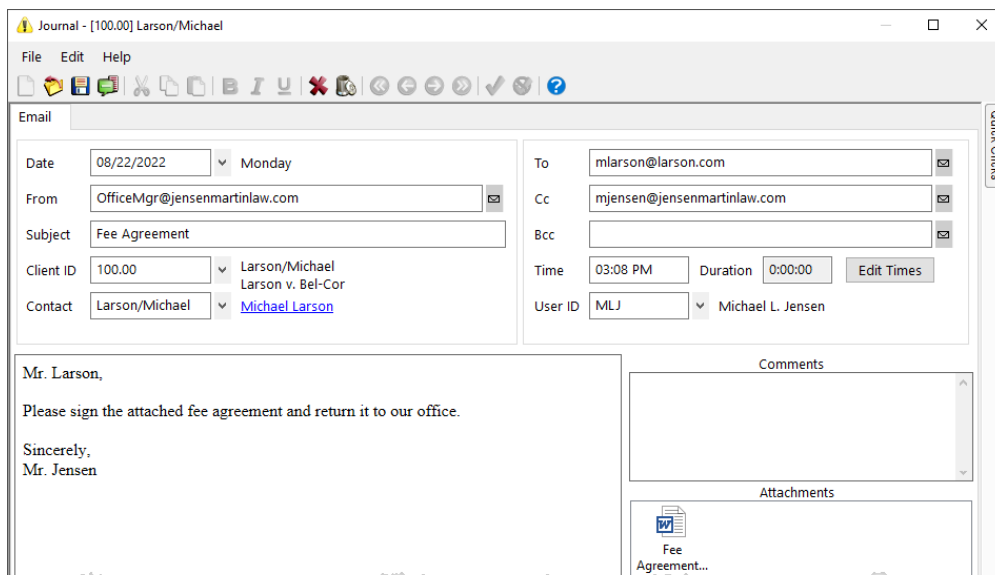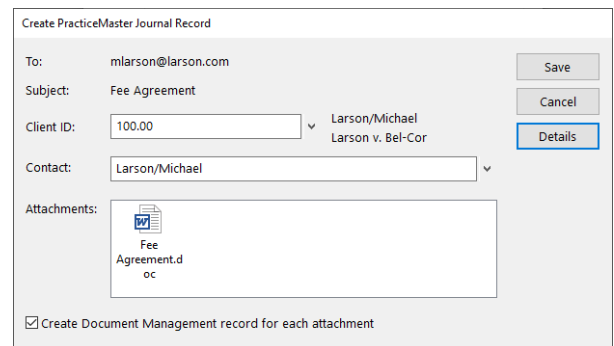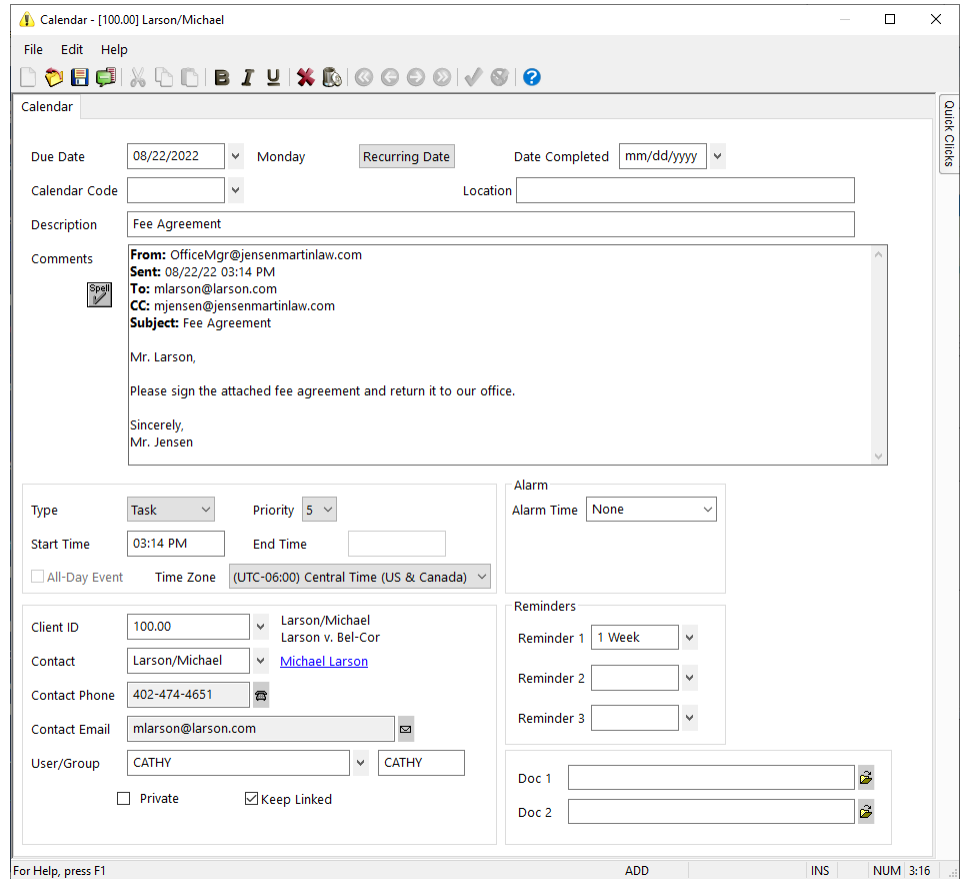
If desired, you can click the **Details** button to open the new journal record and add comments regarding the email. Click the **Save** button (or press Ctrl+S) to save the journal record to PracticeMaster.

Received Email Messages: Calendar Button

To create a PracticeMaster calendar record from a received email, all you have to do is select or open the email message and click the **PM Calendar** button. This will open a new PracticeMaster Calendar window with the information from the email already filled in.
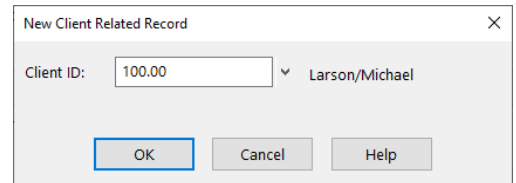
If desired, you can add comments regarding the email. Click the **Save** 💾 button (or press Ctrl+S) to save the calendar record to PracticeMaster.

Received Email Messages: Fee Button

To create a PracticeMaster fee record from a received email, all you have to do is select or open the email message and click the **PM Fee** button. This will open a New Client Related Record window requesting that you enter a Client ID to be associated with the email. After you enter a Client ID, click **OK**. A PracticeMaster Convert to Fee window will open with the information from the email already filled in, as shown on the right.

If desired, you can add comments regarding the email. Click the **Save** 🖫 button (or press Ctrl+S) to save the fee record to PracticeMaster.
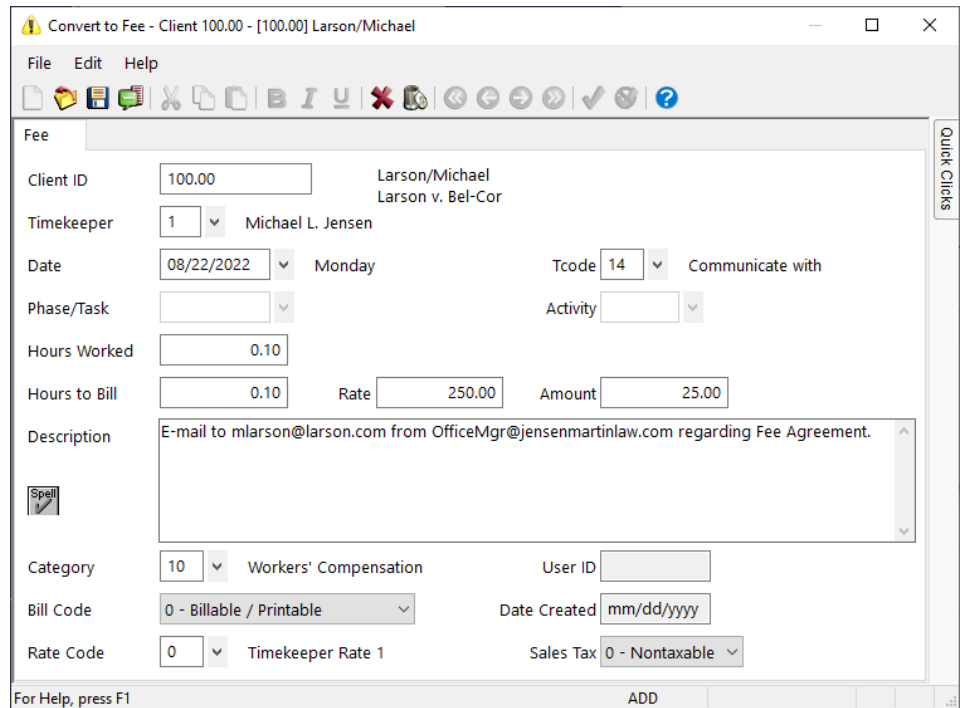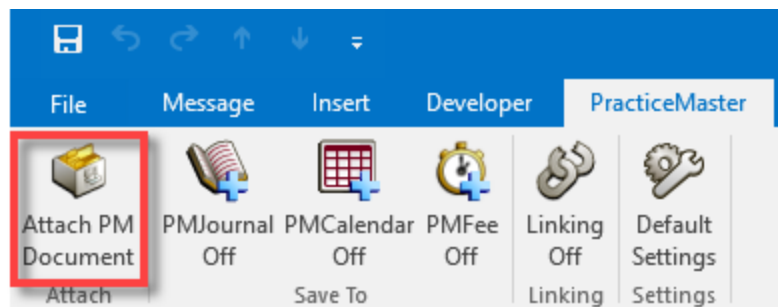

When Sending Email Messages

When creating a new email message, replying to a message, or forwarding a message in Outlook, the **Attach PM Document**, **PM Journal**, **PM Calendar**, and **PM Fee** buttons will appear in the toolbar. The figure to the right shows the **Attach PM Document**, **PM Journal On**, **PM Calendar Off**, and **PM Fee Off** buttons in a new email message. Once the email is sent, a PracticeMaster Journal window will be displayed allowing you to save the email as a new Journal record in PracticeMaster. If the **Calendar** and **Fee** buttons had been On, the Journal window would have been followed by a PracticeMaster Calendar window, and then a PracticeMaster Fee window. If you don't want to save the email in PracticeMaster, simply close the record without saving it, or click each of the toolbar buttons so they read Off instead of On.
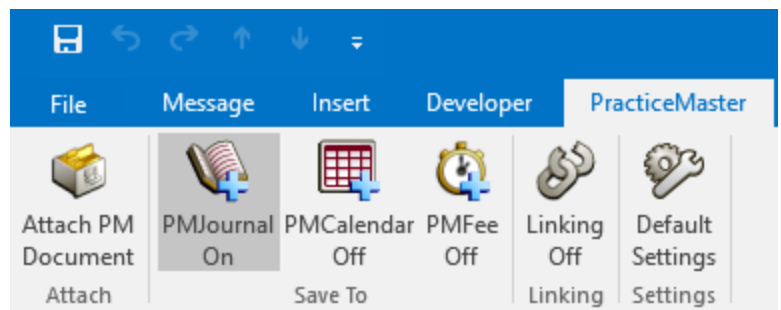

Adding Document Management Files

The **Attach PM Document** button allows you to attach files that are assigned to PracticeMaster Document Management records. Clicking the **Attach PM Document** button will open the Document Management window in PracticeMaster, allowing you to select which records you want to include as attachments. You can select up to ten records at a time from the Document Management window. If you need to attach additional documents to an email, simply click the **Attach PM Document** button again to select more records. You can repeat this process until all the documents you need are attached to the email.

Linking Email Messages

When creating a new PracticeMaster record from an Outlook email, you can create Journal, Calendar, and Fee records. By default, the **Linking On** button is displayed. This button allows you to create one of each type of PracticeMaster record, and then updates the record indicators in your email to reflect that a linked record has been created. Once created, clicking any of the three **Create/Load Record** buttons when linking is turned on will automatically open the linked record in PracticeMaster.
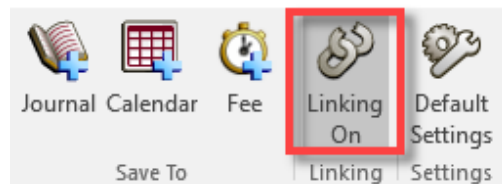
In the event that multiple records will be created, click the **Linking On** button so that **Linking Off** is displayed. By doing so, you can create unlimited PracticeMaster records that are created from, but not linked to, the Outlook email. For example, let's say that an email from a client prompted you to create journal records for each of the client's matters. Turn linking *off* to quickly create multiple PracticeMaster records. Note that the record indicator in your email will only be updated when a linked record is created.

Configuring the Outlook Plug-in

You can also configure default behavior for the Outlook Plug-in by clicking the Default Settings button on the toolbar to open the PracticeMaster Options window.

The **New Message Defaults** and **Record Linking Defaults** sections allow you to specify default behavior for the Journal, Calendar, Fee, and Record Linking buttons.

The **Journaling Options** section allows you to specify folders to move sent and received emails to after they have been journaled.

The **Column Indicators** section allows you to add Journal, Calendar, and Fee columns to a selected folder. These columns make it easy to tell at a glance if an email has been associated with a PracticeMaster record.
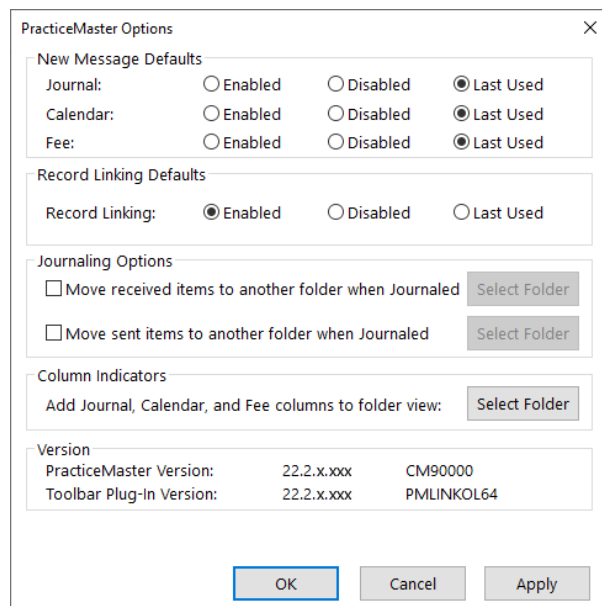
Summary

As you can see, the Outlook toolbar is user-friendly, easy to install, and even easier to use. It allows you to save your Outlook email messages in PracticeMaster without leaving Outlook, and create Fee and Calendar records too! With just a click of a button, you can let PracticeMaster file your emails so all client-based emails are stored in PracticeMaster and accessible by all PracticeMaster users that have rights to the client. Once in PracticeMaster, right-click the journal record and use the **Convert To Fee** option to bill the client as desired; or simply create a fee record directly from the email in Outlook.