

## CMPOnline Microsoft Outlook Add-On

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This document details CMPOnline’s Microsoft Outlook Add-On.

The Outlook add-on should work with all modern desktop versions of Outlook (2010/2013/2016/2019 and Outlook 365). If you have any problems with the installation or use of the add-on, please email us at [support@casemasterpro.com](mailto:support@casemasterpro.com) – we’re happy to help!

### On First Use

When you first use the CMPOnline Outlook add-on in a Microsoft Outlook session, you will need to login to the CMPOnline application for security purposes. Simply enter your CMPOnline User Name and Password, and click the “Sign In” button.



CMPOnline Login

 cmponline  
by Case Master Pro

reset

User Name:

Password:

CANCEL

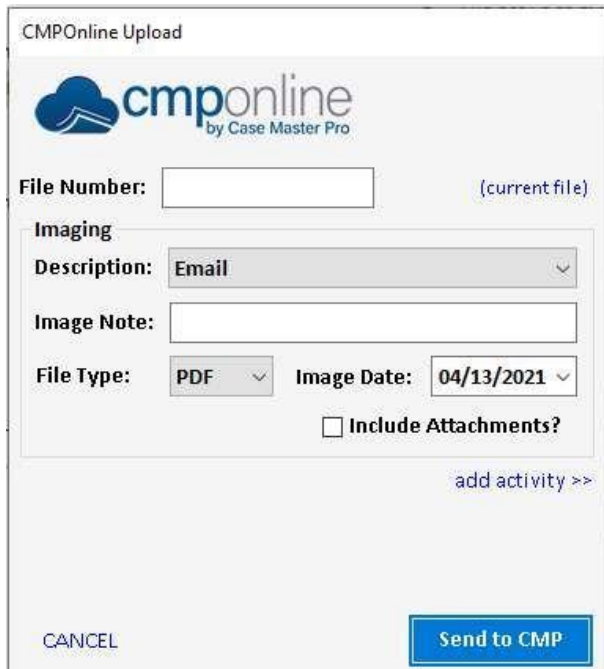
Once signed in, you should not have to sign in again during the Outlook session.

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### Send to CMP

When you open an email, you will see an option to Send to CMP. Upon clicking this button, the below screen will appear.



The screenshot shows a dialog box titled "CMPOnline Upload". At the top left is the CMPOnline logo. Below it, there is a "File Number:" label followed by an empty text input field and the text "(current file)". Underneath is a section titled "Imaging" which contains a "Description:" dropdown menu with "Email" selected, an "Image Note:" text input field, a "File Type:" dropdown menu with "PDF" selected, and an "Image Date:" dropdown menu with "04/13/2021" selected. Below these fields is a checkbox labeled "Include Attachments?". At the bottom right of the dialog is a blue button labeled "Send to CMP". At the bottom left is a "CANCEL" button. A link "add activity >>" is located at the bottom right of the main form area.

The add-on will attempt to determine the correct CMPOnline File Number by looking at the email's "FROM" address (if it's an email that you received) or the first "TO" address (if it's an email that you sent or are sending). If the email address matches an email address on an open case file in CMPOnline, it will load that File Number. If it does not, the add-on will look at the subject line for a valid case file number.


You can also enter the **File Number** manually, select an **Image Description**, enter an **Image Note** (optional), and select a **File Type** (see below for details). If the File Type is MSG, you can **Include Attachments** as images in CMPOnline as well. Finally, you would click "Send to CMP" to send the email to CMPOnline. You can optionally have activity added at the same time.

Please note that when clicking "Send To CMP" on an outgoing email, the email will automatically send to the Outlook recipient.

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### Attach Image from CMP

When you create an outgoing email or respond to an email, you will see an option to Attach Image from CMP. Upon clicking this button, the below screen will appear.



CMP Images

File Number:  (current file) Load Images

Attach?	Date	Entered By	Description	Note	File Type	Date Scanned
<input checked="" type="checkbox"/>	07/23/2021	Jordan	Status update to client		.msg	07/23/2021 09:34:15 AM
<input type="checkbox"/>	07/12/2021	Jordan	Agent's acknowledgement		.msg	07/12/2021 06:01:39 PM
<input type="checkbox"/>	06/30/2021	Jordan	Placement Email to Agent		.msg	06/30/2021 05:32:19 PM
<input type="checkbox"/>	06/30/2021	Jordan	Acknowledgement to client		.msg	06/30/2021 05:31:40 PM
<input type="checkbox"/>	06/30/2021	jordan	Supporting Documents		.zip	06/30/2021 05:28:18 PM
<input type="checkbox"/>	06/30/2021	jordan	Placement Email to Agent	Placement Letter INTL	.pdf	06/30/2021 05:23:20 PM
<input type="checkbox"/>	06/30/2021	jordan	Acknowledgement to client	Acknowledgement (out-source)	.pdf	06/30/2021 05:16:07 PM
<input type="checkbox"/>	06/30/2021	Jordan	Client's placement email		.msg	06/30/2021 05:01:21 PM

CANCEL Attach Selected

You can also enter the **File Number** manually (or click the “current file” option) and then click **Load Images**. You would simply select the images in CMPOnline to attach to your email and click **Attach Selected**.

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### **File Type**

The **File Type** is the file type that is used when uploading the email to CMPOnline. You should experiment with both format types to find out which format best suits you and your firm.

The Pros and Cons of each format are listed below:

**PDF format**      Pros – Opens in browser without downloading

Cons– Cannot reply to the email directly

**MSG format**      Pros – Opens in Outlook, allowing any user to reply to the message

Cons– Message must be downloaded first

### **Questions?**

**support@casemasterpro.com**

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