

YOUR SOFTWARE SOLUTION PARTNER



MAILISSA

Transfer your Outlook mails easily

(Version 1.0.0.7)

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1. The optimal solution for e-mail transferal

We4 IT helps make your daily work much simpler! Transferring e-mails to external applications quick and simple:

Transferring e-mails from Outlook to external applications can be annoying and not very user-friendly. Yet we have some good news for you: copy & paste procedures, time-consuming E-mail transferring or the loss of important information are now a thing of the past.

MAILISSA makes it possible to transfer e-mails from Outlook to external applications such as ERP/CRM systems within just a few clicks. Whether in service calls, opportunities, contracts or other categories, your e-mails can be assigned and transferred to the corresponding companies, projects or contacts in the CRM system in only a few steps.

Let **MAILISSA** help your company save time and resources!

2. Technical Basis

- MAILISSA is compatible with all Outlook version starting from version 2013.
- It is not possible to use the add-in with Outlook on the web yet.
- The Add-In offers a documented REST interface, to which a server application can be implemented, with which the add-in communicates.

3. Implementation/ Set-Up

From customizing to integration to support, our experts will accompany you on the implementation of MAILISSA from start to finish. Whether HCL Notes & Domino, Salesforce, SAP, Oracle or Microsoft Dynamics: MAILISSA is compatible with all common CRM systems and can be individually customized according to your wishes and requirements, giving you a tailored product that suits your needs perfectly.

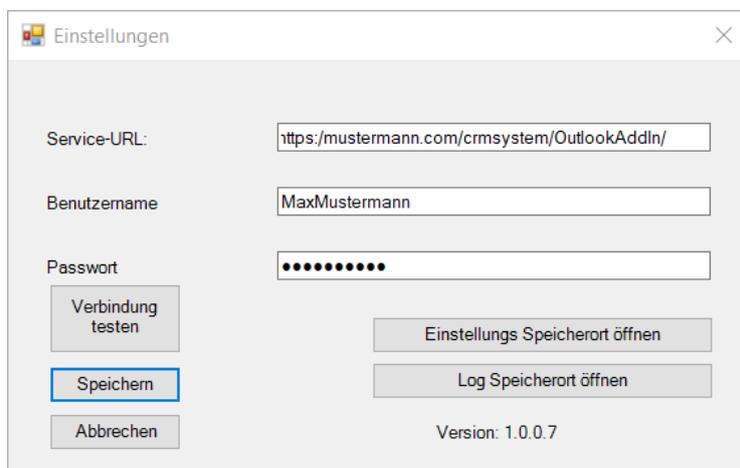
4. Sample Application

4.1 Configuring MAILISSA

Before MAILISSA is operated for the first time, a server and logon data must be specified for the add-in to communicate with. To enter the data, go to the [MAILISSA](#) tab in the Outlook ribbon menu and click on the "[Einstellungen](#)" (Settings) button, as shown in the following screenshot.



The settings window takes you to the directory on your system, where the log files can be found. Press the button "[Log Speicherort öffnen](#)" (Open log location). Once you have entered all the data, you can use the function "[Verbindung testen](#)" (Test connection) to check whether a successful connection can be established with the data you have entered. The settings are then saved in the user roaming directory.

A screenshot of the 'Einstellungen' (Settings) dialog box. The dialog has a title bar with a close button. It contains several input fields and buttons. The 'Service-URL:' field contains 'https://mustermann.com/crmsystem/OutlookAddIn/'. The 'Benutzername' field contains 'MaxMustermann'. The 'Passwort' field is masked with ten black dots. Below the password field are three buttons: 'Verbindung testen', 'Speichern' (highlighted with a blue border), and 'Abbrechen'. To the right of these are two more buttons: 'Einstellungen Speicherort öffnen' and 'Log Speicherort öffnen'. At the bottom right, the text 'Version: 1.0.0.7' is displayed.

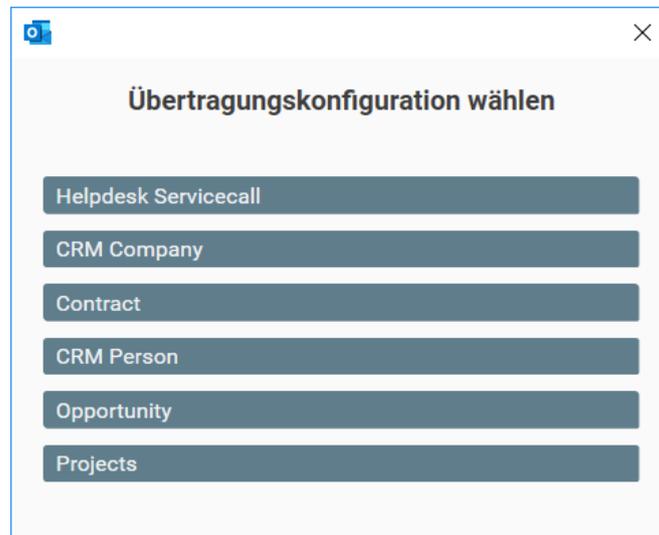
4.2 Transferring e-mails

Upon receiving an e-mail from a customer in Outlook, you are ready to transfer it directly to your desired system in just [three steps](#).

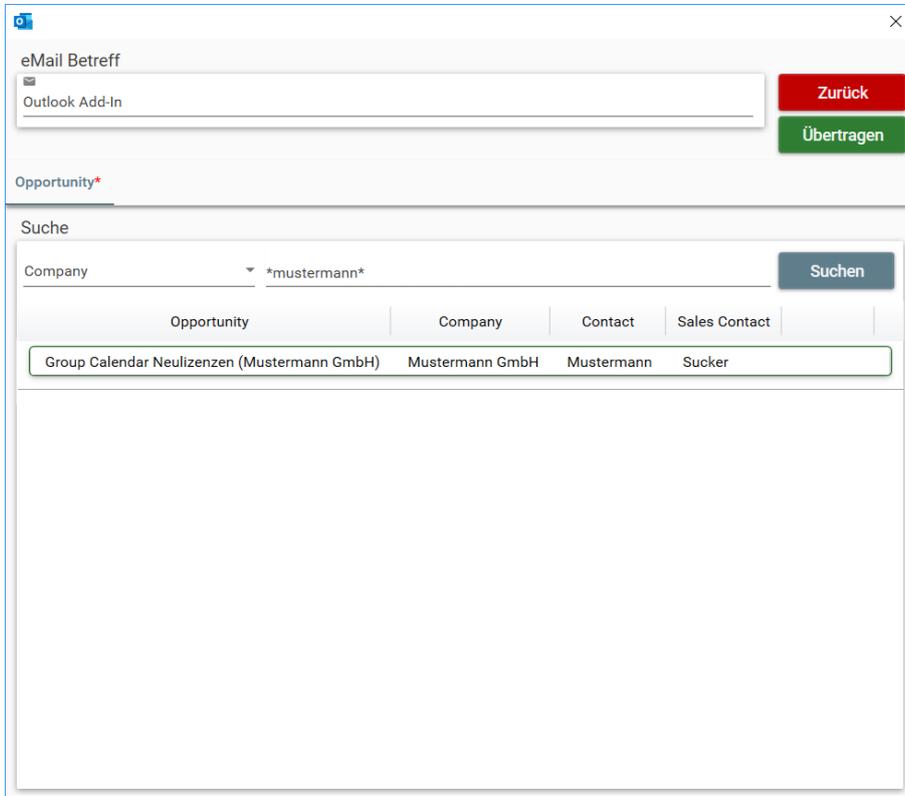
- **Step 1:** Select the add-in [MAILISSA](#) in the ribbon menu to start the process.



- **Step 2:** Select the category that you wish to assign the e-mail to. The categories listed in the screenshot are shown only for illustrative purpose. They can be individually adapted to your requirements.

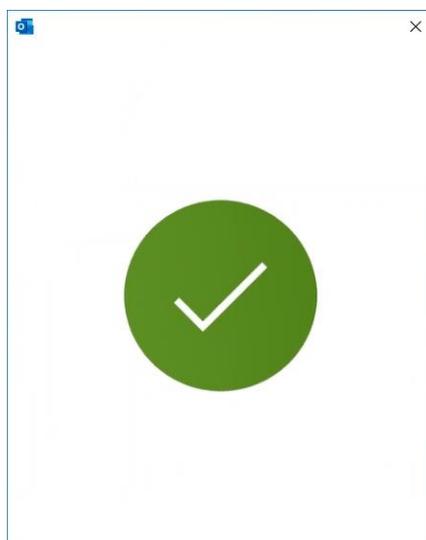


- **Step 3:** After selecting the category, you can assign the e-mail to a specific ticket, customer, company or project. The integrated search function enables you to find the corresponding metadata in no time.



The screenshot shows a web application window with a search interface. At the top, there is a section for "eMail Betreff" with an "Outlook Add-In" field and two buttons: "Zurück" (red) and "Übertragen" (green). Below this is a section titled "Opportunity*" with a search bar labeled "Suche". The search bar contains the text "*mustermann*" and a "Suchen" button. Below the search bar are four tabs: "Opportunity", "Company", "Contact", and "Sales Contact". The "Company" tab is selected, and the search results show a list of companies: "Group Calendar Neulizenzen (Mustermann GmbH)", "Mustermann GmbH", "Mustermann", and "Sucker".

- **Done:** After selecting the contact, the e-mail is transferred to your corresponding system and is linked to the person or company selected in the previous step. Attached images and files will be transferred as well.



5. About We4IT

We4IT has more than 15 years of experience in the operation and modernization of IBM Lotus Notes systems and currently focuses particularly on application migration.

We4IT has its headquarter located in Bremen, but its field of activity covers the entire DACH region. At present we have a total of 25 employees, two of whom are notably IBM Champions.



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