Wiise – Microsoft Outlook Integration

Overview

The Microsoft Outlook integrated add-in from Wiise empowers you to efficiently handle your business communications with customers and vendors. By using the Wiise add-in, you can easily access financial data associated with customers and vendors and generate financial documents like invoices and quotes without leaving your Outlook inbox.

The Wiise add-in comprises of two distinct components that deliver the following functionalities:

Contact insights - With this add-in, you can retrieve Wiise customer or vendor data straight from Outlook emails and calendar entries. Additionally, you can draft and dispatch Wiise business papers, such as sales quotes or invoices, to a specific contact.

Document view - Whenever a business document is transmitted in an email, this add-in presents a direct link that takes you from the email to the actual document in Wiise.

Suppose you receive an email from a customer requesting a quote for specific items. In Outlook, you can launch the Contact Insights add-in, which identifies the sender as a customer and presents their customer card. From this interface, you can access an overview of the customer's information and retrieve detailed data on specific documents, including their sales history. If the sender is a new contact, you can promptly create them as a new customer in Wiise within the add-in without navigating away from Outlook.

With the add-in, you can effortlessly compose a sales quote and send it back to the customer without having to switch to another program. All of the necessary information required to create the sales quote is available in your Outlook inbox. Once you have entered the details, you can post the quote and transmit it by email. Business Central creates a .PDF file of the sales quote and attaches it to the email message that you compose in the add-in.

Similarly, if you receive an email from a vendor, you can utilize the add-in to manage vendors and purchase invoices.

Step 1 - Get Started

1. The initial step is to install the Wiise add-in within Outlook. It's possible that your administrator has already installed the add-in on your behalf. If you're uncertain, please check with your administrator.

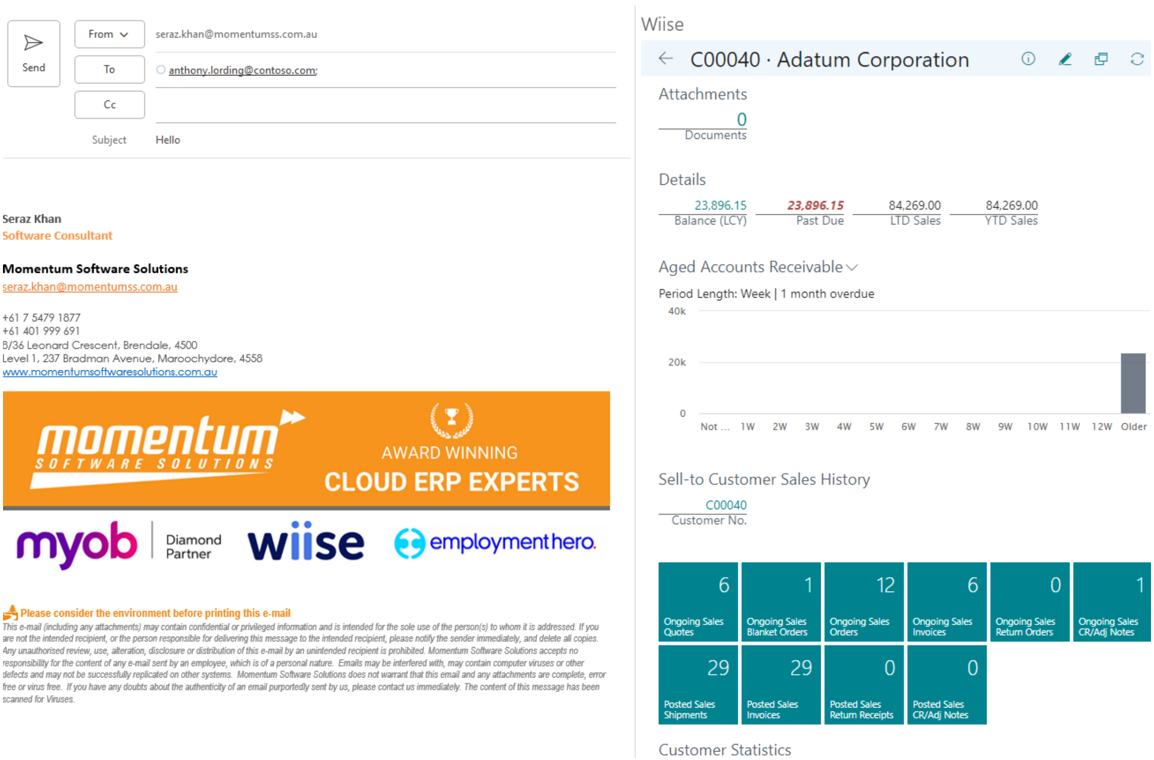
2. Once the add-in has been installed, you can access the Wiise add-in within any new or existing email message in Outlook.

First, sign into Outlook and open an email message. If you're using the Outlook app, you can locate the contact insights icon on the ribbon. However, if you're using Outlook on the web, look for the Contact Insights add-in icon at the top or bottom of the email message, or press the "Show more actions" button to reveal it.

The first time you use the add-in, you might be prompted to sign in within the Wiise add-in pane. If so, select "Sign in now" and follow the on-screen instructions to log in to Wiise using your account.

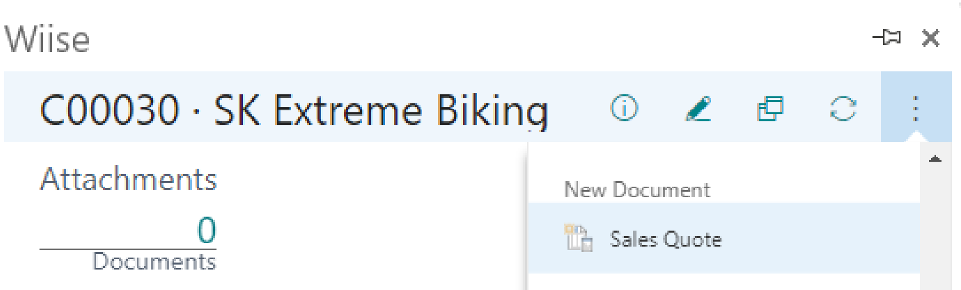
Step 2 - Look up a business contact

1. Begin by composing a new email message.
2. In the ribbon, navigate to "Contact Insights." Alternatively, if you are using Outlook on the web, choose the "Business Central add-in icon in Outlook" located at the bottom of the message, followed by "Contact Insights."
3. Within the Business Central add-in pane that appears, locate and select the desired contact. An overview of the contact will be displayed in the pane, and the contact's information will be added to the "To" line of the email.

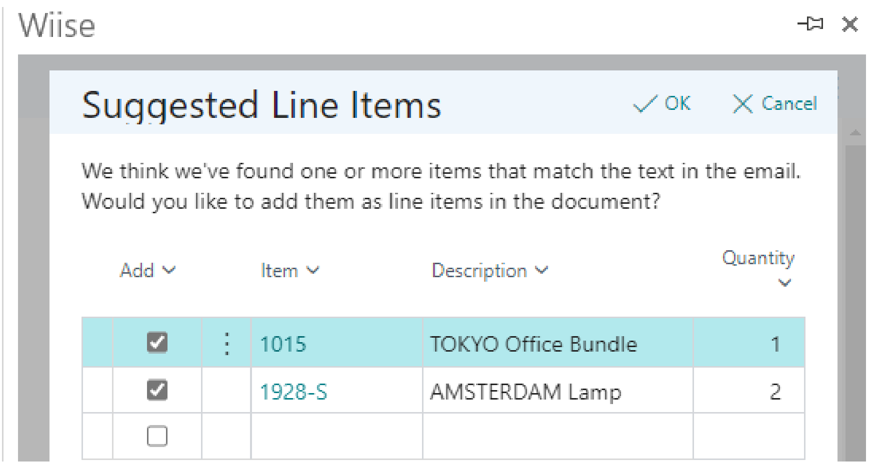


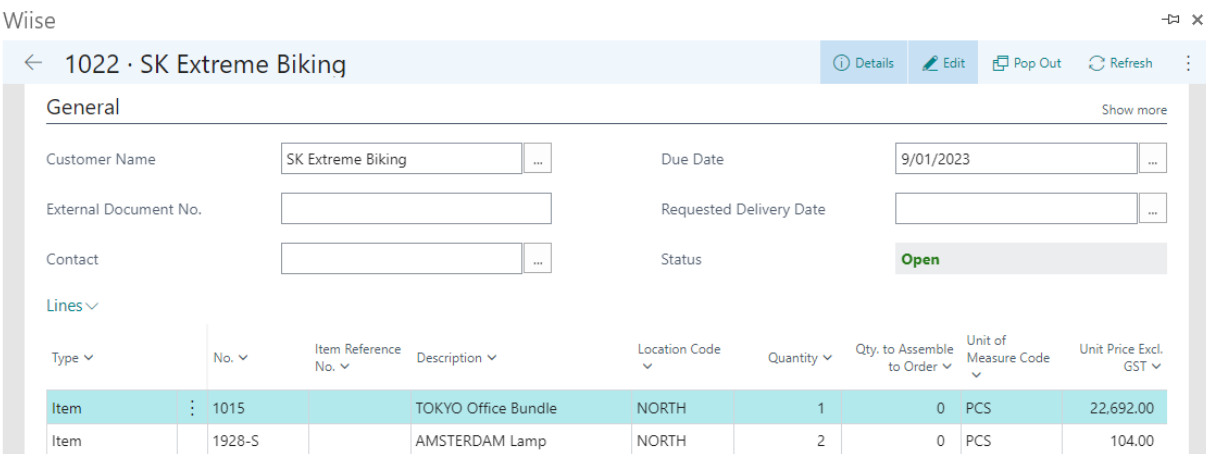
Step 3 – Create and send new document to a contact

1. In the ribbon or at the bottom of the email message, choose Contact insights add-in icon in Outlook. Business Central > New, then choose the type of document you want to create, such as Sales Quote.

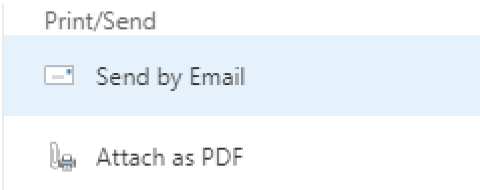


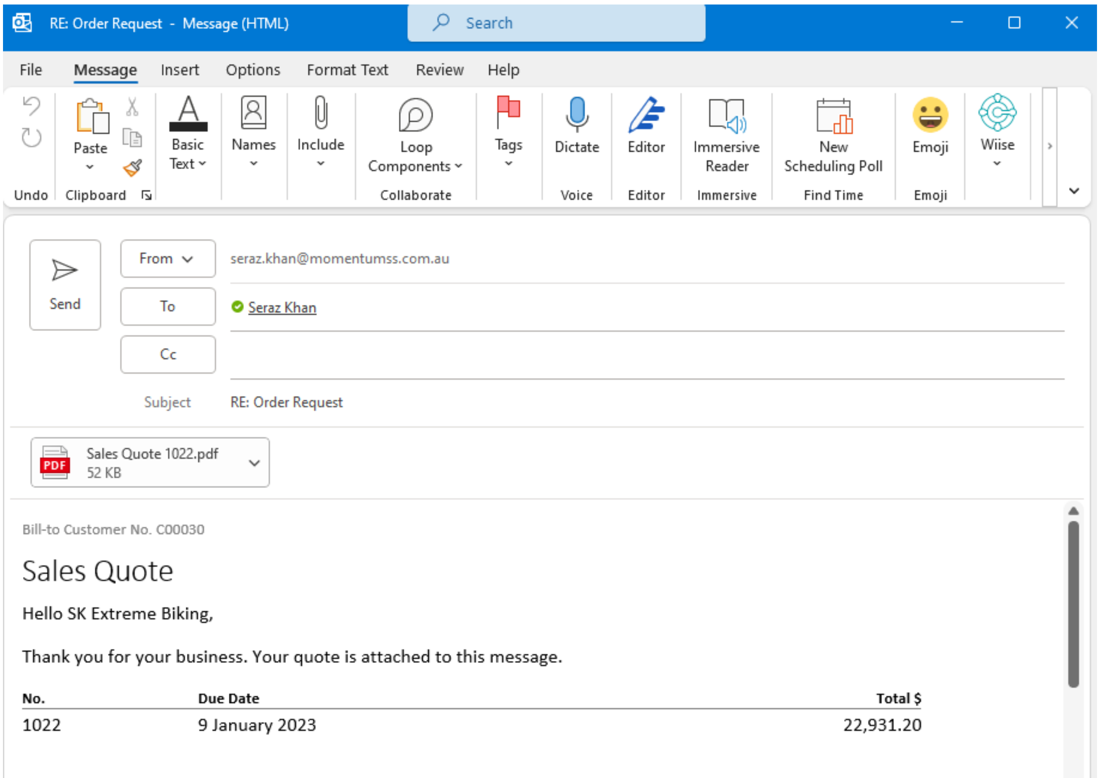
2. Make changes to the document in the Business Central add-in pane.





3. When the document is ready to send to the contact, in the action bar, choose Show more actions, then choose the Send by Email action.

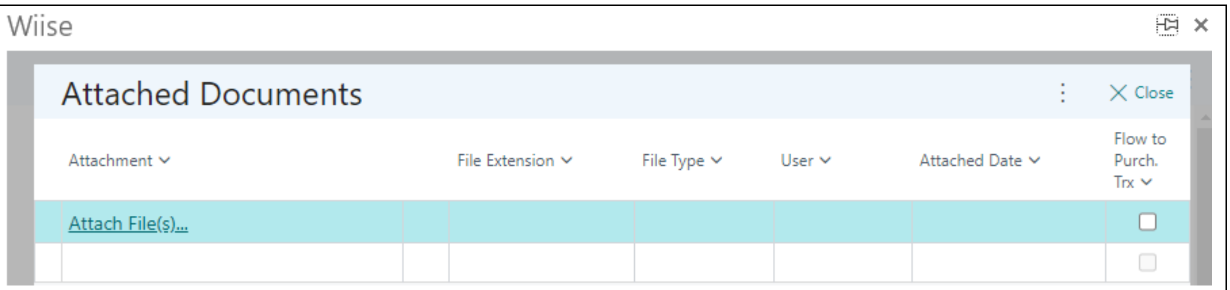




Step 4 - How to attach a file

1. Open the email, Contact Insights add-in icon in Outlook.
2. In the action bar of the add-in, choose Show more actions > Attachments.

The Attached Documents page opens to list any documents that are already attached to the record.



3. Choose Attached File(s)..., then choose one of the following options:

   Choose Attach from email to upload all or selected files that are attached to the email.

   Choose Upload from file to upload one or files from your device.