How to use IQ within Outlook's Add In feature

Market: House, Senate
Module: Messages
Purpose: This guide provides instruction on how to synchronize IQ records with Outlook using Outlook's Add-In feature so you can import the Outlook message as an IQ message record or associate the Outlook message with service records and schedule records in IQ.

| **Key Benefits** |
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| IQ can be integrated with Outlook using Outlook's *Add In* feature. Thus, you can import Outlook messages as IQ records so that you can associate them with messages, services, and/or events records in IQ. |
| These steps require that IQ has been installed within the Microsoft Outlook Add In feature. Contact your IQ Consultant for this process. |

1. Within your Microsoft Outlook account, search and select the email that you want to import into IQ as an IQ message record.

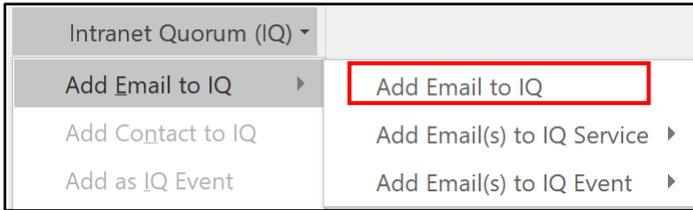2. Navigate to your Outlook menu and select **Add-ins.**

3. Select **Intranet Quorum (IQ) > Add email to IQ**.
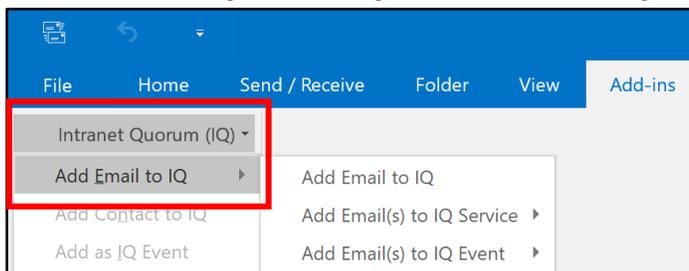
4. Select an option.

Option 1: Add email to IQ.

This option will import your Outlook email message into IQ and will saved it as an IQ open message.

1) Outlook Add In will search your IQ contact records using the email sender's name.

2) Based on the results, click the contact who matches with the sender of the email. You will see the phrase, "matched to contact with ID _____" once you have selected your contact.

3) If the contact does not exist, click **search again** to confirm the search.
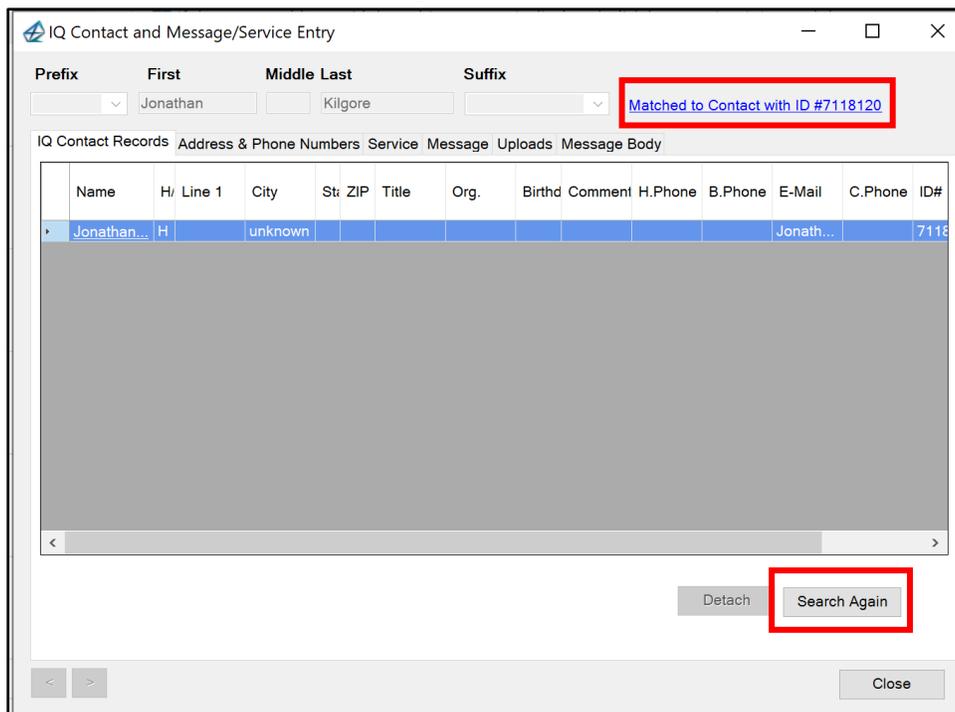
4) Click the **address & phone numbers tab.** Enter the contact information.
5) Click **Add Contacts to IQ**.

6) Click the **Message tab.** Select at least one issue code that applies to this message and select the contact whom to assign the message (by default it will choose you). Enter comments as needed.

7) Click **Assign as IQ Message.**

Note: Selecting the **Service** tab also allows you to import this message into an IQ service record. As displayed on the screen shot, navigate to **Service tab.** Select a service option. This method allows you to confirm that that correct contact was selected prior to creating a new service using the Outlook message.
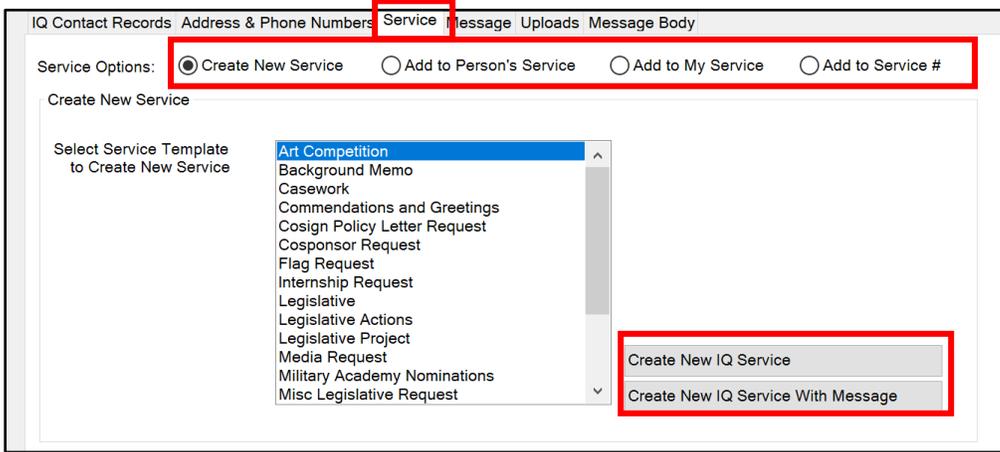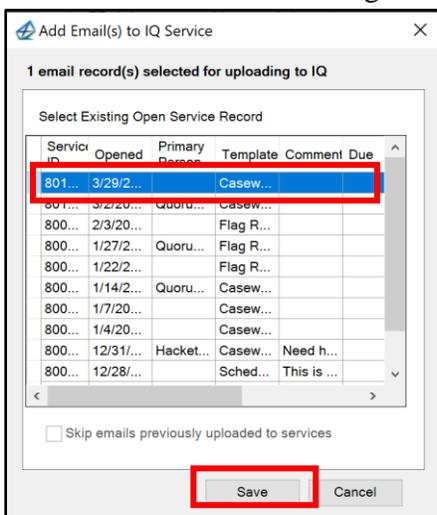
Option 2: Add email(s) to IQ Service. This option will import your Outlook email message into IQ and will saved it as an IQ open message that is associated with a new service record, or an existing service record in IQ, or a Service ID number .
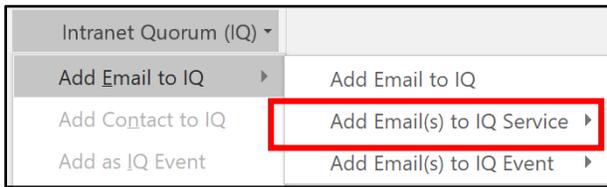
Creating a new service allows you to choose your service type and immediately create a new service with this message attached to it along with the contact who sent it.
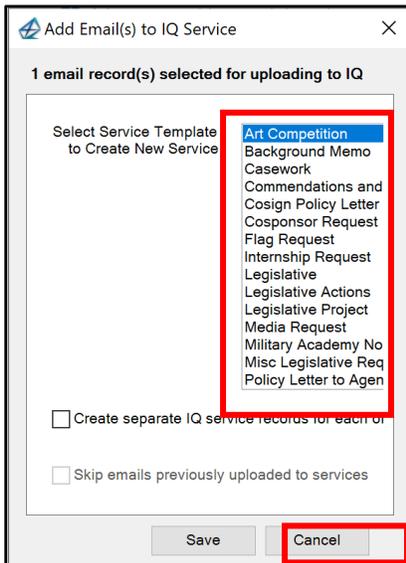
Add to a Pending Service in IQ gives you a list of your active services in IQ in which you can select to associate the Outlook message.

Add to IQ Service by ID # allows you to type in a specific Service ID # and send the message to that Service.

Option 3: Add email(s) to IQ Event. This option allows you to quickly **create a new event in IQ** and associate it with the Outlook message or **associate the message to an existing IQ event**. These options require you to choose which calendar to add the event to and fill in other details for the event.
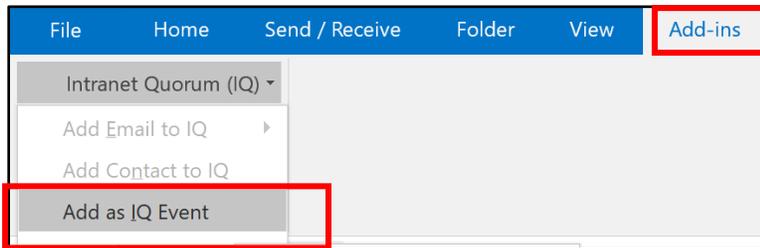
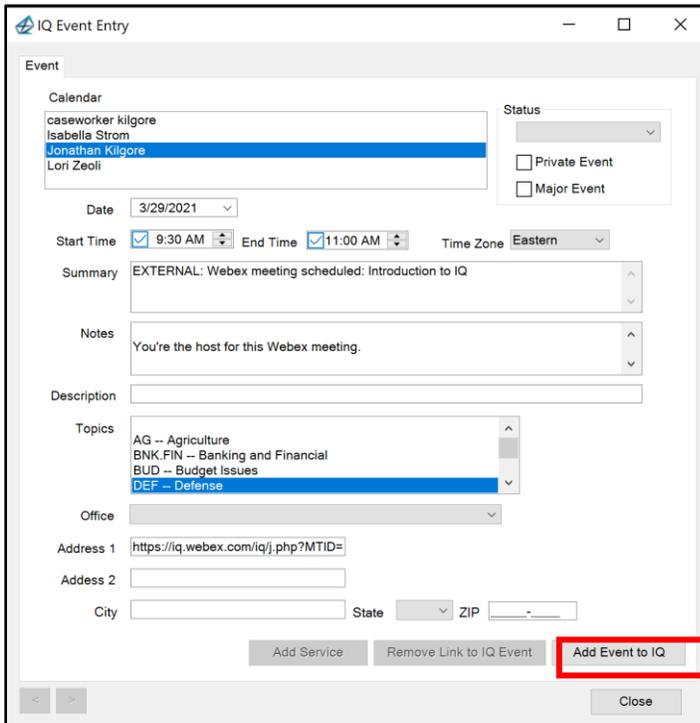1) Within Outlook, select the Calendar icon.

2) Select the event you wish to add into IQ. You should see a black outline around the chosen event.
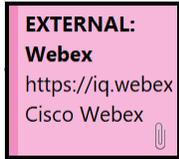
3) Scroll to the Outlook menu at the top and navigate to **Add-ins > Intranet Quorum (IQ) > Add as IQ Event**.

4) Outlook has pulled all the information from the event you selected and applied it to the appropriate fields for IQ. Enter additional details as needed. Select **Add Event to IQ** when finished.

5) Within Outlook, select the Contact icon.

6) Select the contact from Outlook that you wish to add to IQ. Navigate to Add **In > >Intranet Quorum > Add Contact to IQ.**

7) Determine if the contact already exists in your database.

8) Select **address & phone number** to view all of the information about the contact. Edit details and add affiliation codes as necessary and then select **Add contact to IQ**.