



Installing the Primafact Add-In for Microsoft Outlook

Revision: 2018/11/13
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The Primafact Add-In for Microsoft Outlook allows users to send e-mails and attachments directly to Primafact. This document guides users on how to install this Add-In.

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Overview

The Primafact Add-In for Microsoft Outlook allows users to send e-mails and attachments directly to Primafact. E-mails and attachments are automatically converted to PDF and imported to a user's Document Intake folder.

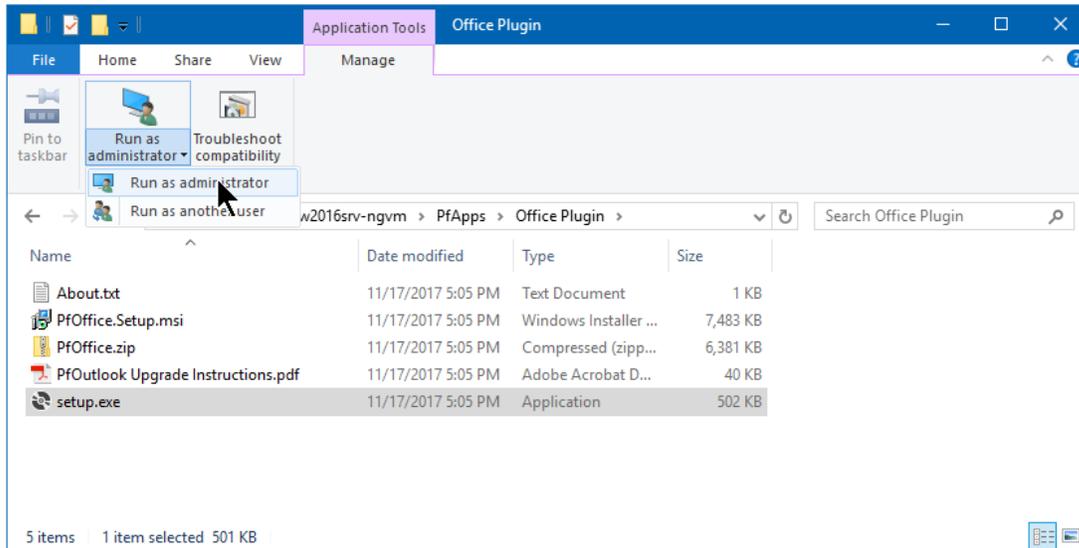
This functionality generally eliminates the need to print e-mail materials to the Primafact printer, provides an easier method than drag and drop, and allows sending new e-mails and attachments directly to other users.

These steps should not be performed by an Administrator – they need to be performed by each Primafact user. Instructions for installing the Add-In can be provided by email. Additionally, you may want to consider creating a link on each user's desktop to run the installation.

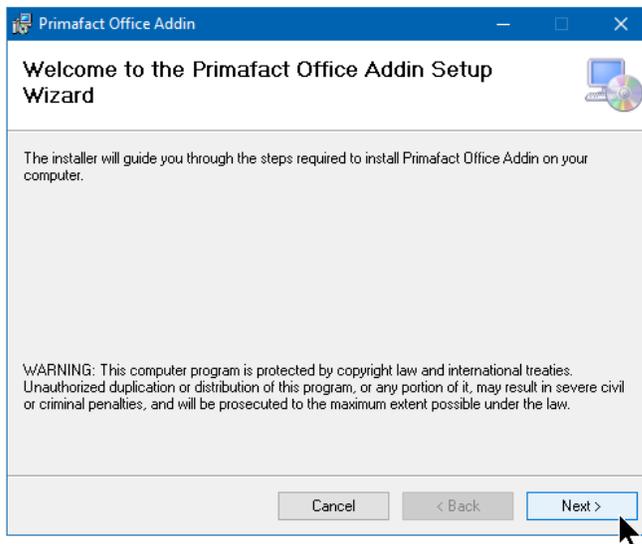
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Installation

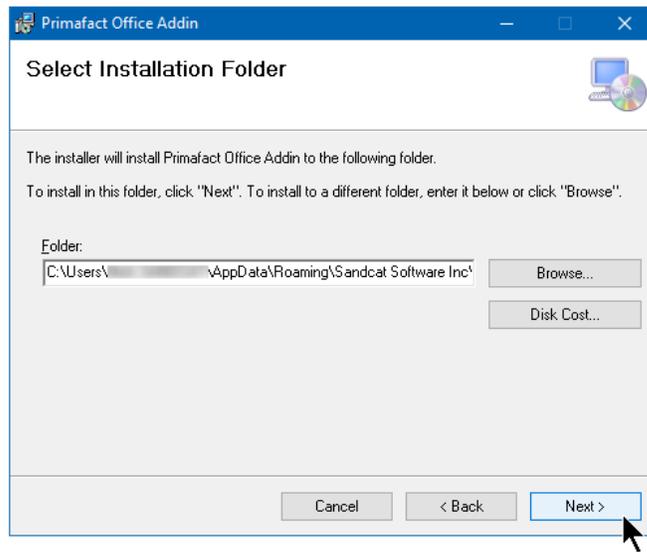
1. Navigate to the PfApps share on the Primafact application server. Open the Office Plugin folder, and run Setup.exe.



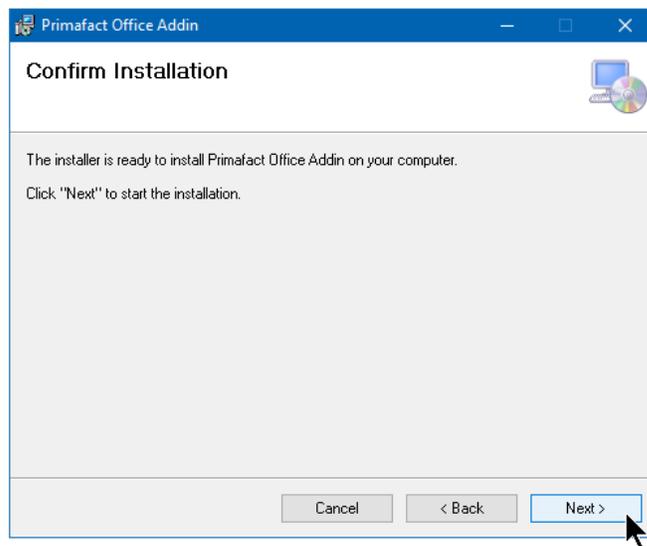
2. Click Next on the Welcome dialog.



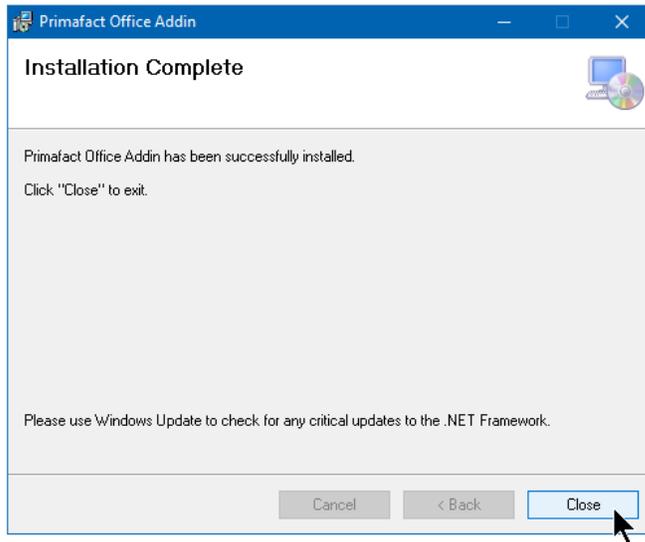
3. Click **Next** on the **Installation Folder** dialog.



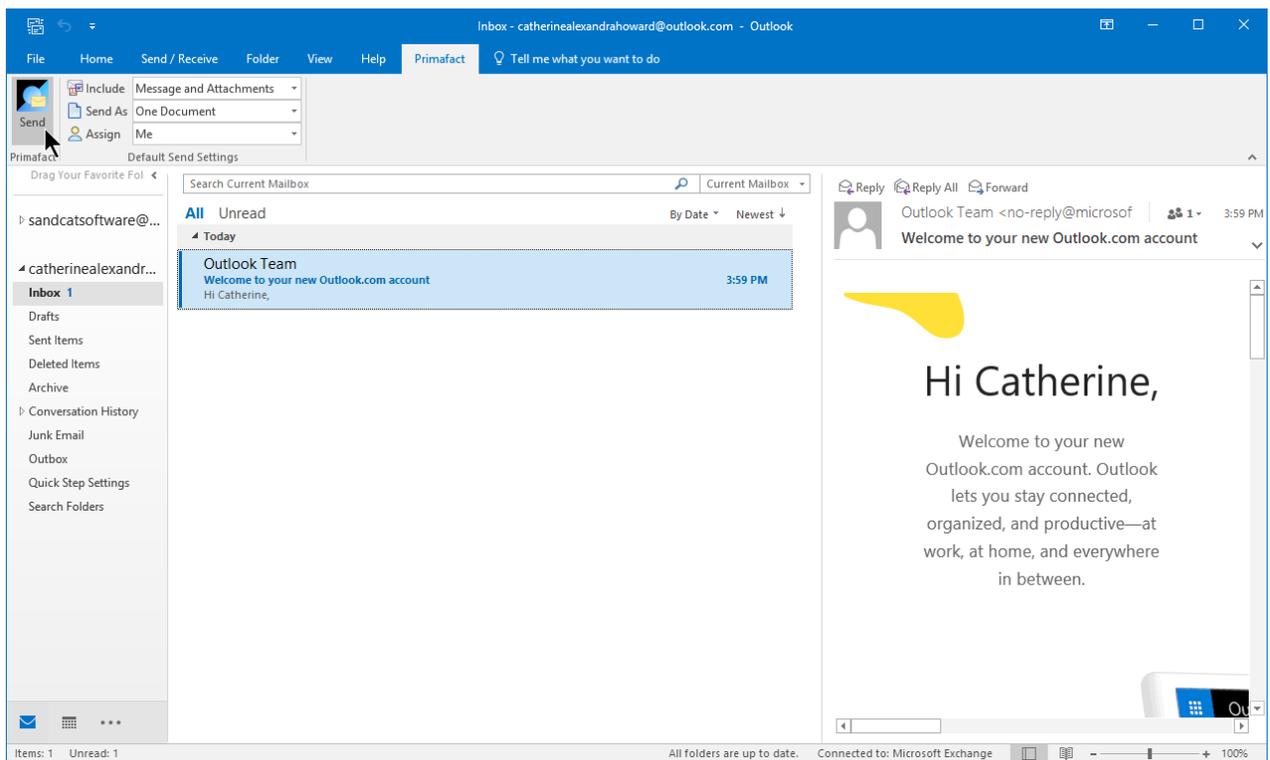
4. Click **Next** on the **Confirm Installation** dialog.



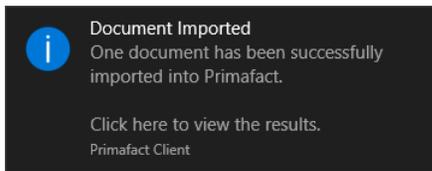
5. There will be a quick progress bar followed by the **Installation Complete** dialog. Click **Close** to finish the installation.



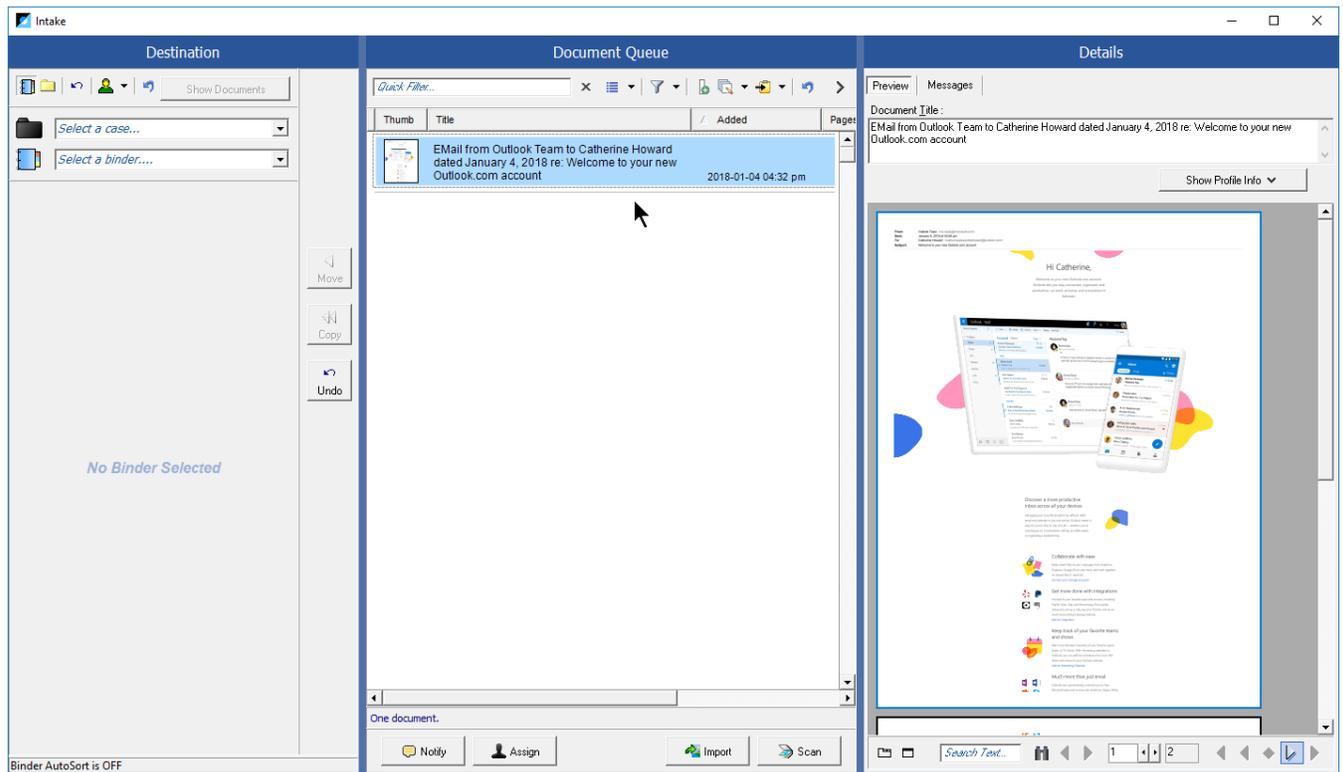
6. To test, open Outlook. Select the **Primafact** tab on the ribbon, and click the **Send** button.



7. You should see a notification above the system tray in the taskbar:



8. If you switch to Primafact and go to your Document Intake area, you should see the e-mail you sent from Outlook:



Appendix A : Making a Support Request

Customers can greatly assist in expediting the requests for technical support by providing as much relevant information as possible at the time of the request:

- Name of Firm.
- Individual Contact Information (Name, Telephone Number, e-mail).
- Prismafact Version (open Prismafact, select the menu [Help | About](#)).
- Hardware Involved :
 - Server
 - Desktop or Notebook
 - Scanner and / or Scanner Workstation.
- Operating System.
- Description of problem and how to reproduce it.
- The (approximate) number of users affected (one user, some users, all users).

Any supporting files and screen shots: In general, screen shots can be captured by pressing the Shift and PrintScreen keys (which copies an image of the desktop to the Windows clipboard). You can paste the screen shot into an e-mail message. Alternatively, you can paste the image into Microsoft Paint, or a Word Processor, save it, and send it as an attachment.

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Technical support staff are available during business hours, Eastern Standard Time. Requests for technical support can be made via e-mail or telephone.

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