

Using the Agiloft Contract Assistant for Outlook

The Agiloft Contract Assistant (ACA) for Outlook can fulfill multiple different functions between Microsoft Outlook and Agiloft. With the ACA for Outlook, you can:

- Add email information, such as attached files and email text, to existing records
- Add attachments from existing records to an outbound email
- CC Agiloft in an email to ensure responses are automatically captured in the system

These functions are covered in the Use Cases section in this article; the first function listed above is covered in the first use case and the second and third functions are covered in the second use case. To begin using the ACA for Outlook (ACA), click the large A icon on the top right corner of Microsoft Outlook. You can also launch the add-in using the three dots found on the far-right of an email message.

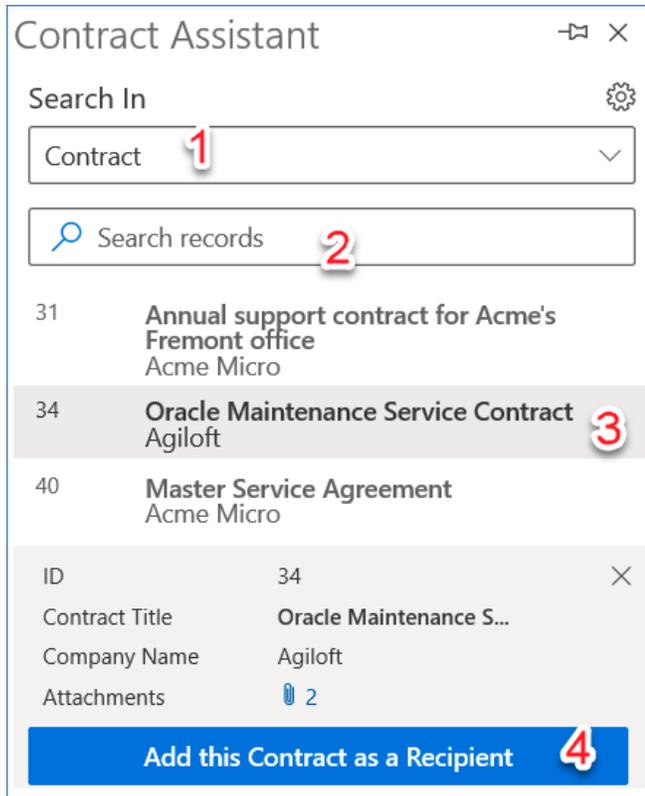
✔ If the icon appears, but is disabled, open an email or create a new email draft.



Navigating the Agiloft Contract Assistant

The anatomy of the ACAO changes slightly depending on when you open it. The ACA icon is available when you create a new email or when you view an existing email. When you open a new email and click the ACA icon, you have the option to add the email address from a record to the CC field. However, if you open an existing email, you have the option to add that email to an existing record.

When you click the ACA icon while drafting an email, the ACA pane includes the following options. Points of interest are designated by numbers.



1. The "Search In" field drop-down list shows tables that were selected to work with the ACAO during the [configuration](#) process. You can configure multiple tables to appear here; in most cases, the list includes Contracts.
2. Use the "Search records" bar allows to run a simple text search in the selected table. The text search searches against the fields that were selected during the [configuration](#) process.
3. Select a record from the list of results for an additional section to appear at the bottom of the pane.
4. Selecting a record causes this pane to appear. The pane shows a few key record fields, based on how the feature was configured. Clicking the link next to Attachments allows you to view and select Attachments that you'd like to add to the response. The "Add this Contract as a Recipient" button adds the email address from the selected record to the CC field of the open email.

When you click the ACA icon after opening an existing email, the ACA pane includes the following options. The first three numbers are the same as above, with the only difference in the fourth being the button.

1. The "Search In" field drop-down list shows tables that were selected to work with the ACAO during the [configuration](#) process. You can configure multiple tables to appear here; in most cases, the list includes Contracts.
2. Use the "Search records" bar allows to run a simple text search in the selected table. The text search searches against the fields that were selected during the [configuration](#) process.
3. Select a record from the list of results for an additional section to appear at the bottom of the pane.

4. Selecting a record causes this pane to appear. This pane is configurable to show different fields from the records of whichever table is selected under the "Search In" drop-down list. The "Add to this Contract" button adds the email to the record.

Use Case

This section showcases a sample use case of the Agiloft Contract Assistant for Outlook.

Push Email Information to Existing Records in Agiloft

You can push email information, such as attached files and email text content directly to an existing record in Agiloft. While this feature is commonly used with emails in your inbox, you can use the below method for emails in any folder, including Sent.

1. Open Microsoft Outlook and launch the ACA. On Desktop, do so by clicking the large A icon on the top right-hand corner of your ribbon. On Web, do so by opening an email and clicking the three dots found on the far-right of the email message. For example purposes, let's assume we received an email with an NDA agreement from a third-party company called Acme, and we want to upload the contract to Agiloft.
2. Click Sign In on the pane that appears. Input your credentials and click **Submit**. You can also log in via SAML or OAuth using their respective buttons.
3. After logging in, use the Search In drop-down list to select the table you'd like to work with. For our example, we'll select the Contracts table, but you can use any table in your system. This populates the ACA pane with all the records from the Contracts table. You can also search for records from the selected table using the Search records bar. In this example, we might search for Acme in order to pull up existing Contract records in the selected table that mention the third-party company.
4. The search for Acme reveals a Contract record called "NDA for Acme" that is in the Pending Approval status. Select the record to open a small window at the bottom of the ACA pane. This window contains information about the fields that were selected during the Configuration process.
5. Once you've verified the information in the small window, click **Add to this Contract** to send the attachment to Agiloft. Clicking this button creates a new record for the NDA agreement in the All Contract Attachments embedded table on the Attachments tab of the Contract record selected in step 4. If you navigate to the Emails tab, you can also see a new record in the Email Communication History table. This record contains the original recipient, subject, actual text content of the email, the actual attachment, and the date the record was created.

Respond to Emails using the ACA

You can use the ACA to easily add relevant information when crafting response emails. You can also ensure that any responses to your email are recorded automatically in Agiloft. We'll build off of the NDA agreement example in the previous section.

1. In the email you'd like to respond to, click **Reply** or **Reply All**. For our example, this is the same NDA agreement email we pushed to Agiloft in the previous section.
2. Open the Agiloft Contract Assistant, and log in if prompted.
3. Select the Contracts table. Search for the ID of the same NDA agreement Contract record from step 4 in the previous section and select it.
4. In the small window that appears, click the numerical hyperlink in the Attachments field to view the record's attached files. Building off of the previous example, we would see the NDA agreement we added listed here along with any other attachments.
5. Click an attachment to add it to the email. There is no limit to the amount of attachments you can add to an email from the ACA, but if you add a significant amount you may not be able to send due to the standard Outlook parameters for email size. You can add attachments from multiple different records simply by opening a new record in the ACA pane after adding an attachment from a previous record.
6. Now that the email draft has some attached files, click **Add this Contract as a Recipient**. This adds the inbound email address from the configuration process to the CC field of the email draft. If the recipient to the draft email responds with the inbound email still CC'd, Agiloft automatically captures the email response in the Emails table and links the new Email record to the existing record in the Contract table. If you click **Add this Contract as a Recipient** on multiple records, the information is saved against the record selected most recently. If you don't have inbound email set up, you can still click **Add this Contract as a Recipient** to grab the ID that Outlook assigns to the email. As long as the email is sent before a very long timer expires, this will push the email information into the Email Communications embedded table.
7. Send the email.