Troubleshooting the Agiloft Contract Assistant for Outlook

If you encounter issues installing, accessing, or using the Agiloft Contract Assistant for Word, use this page to troubleshoot. Error messages and their solutions are included in tables specific to each section, and compiled in a table at the bottom of the page.

General Notes

Consult this section for general information before you install the app.

Hosting

You cannot use versions of the app that use Release 23 or beyond if the Outlook server is hosted on premise; the app only works if the email server is hosted on O365. If you are not hosted on O365, you can only access the Release 22 version.

The recommended server configurations is the Exchange Mail server on O365 and Agiloft on an Agiloft-maintained server.

Inbound Email

For the best experience with the app, you should have Inbound Email set up for your KB.

Installation

Consult this section for troubleshooting issues that may occur during installation.

Can't view Add-in store or app

Check to see if connected experiences are turned on if:

- You can't view the Office Add-in store
- You can't view the app in Outlook

To turn on connected experiences:

1. Open Microsoft Outlook and click Options.
2. Click Trust Center and then Trust Center Settings.
3. On the left-hand side of the Trust Center window, click Privacy Options and then Privacy Settings.
4. Make sure that connected experiences is turned on.

Optional connected experiences

Office has experiences that are powered by cloud-backed services. Your organization has given you the option to use some of these experiences. For example, experiences that help you search for online pictures to add to your slides or to find information available online about a word or phrase used in a document.

☑ Turn on optional connected experiences

5. Restart Outlook.

Privacy service turned off

If you receive the error message in the table below the first time you launch Word after adding the app, check to see if connected experiences are turned on. To do so, follow the steps in Can't view Add-in store or app.

Error Message	Solution
The service required to use this feature is turned off. Check your privacy settings.	Open Microsoft Outlook > Options > Trust Center > Trust Center Settings > Privacy Options > Privacy Settings > Turn On optional connected experiences.

Post-Installation

This section addresses issues that may occur when using the app after installation.

Not receiving email messages

If you are not receiving email messages, always make sure to check your spam folder first. You may have to reconfigure your email rules or other settings to receive these messages.

Problems logging in

If you are unable to log in to the app once it is configured and installed, ensure that the Group you are in has access to REST services. To check:

1. Navigate to **Setup > System > Manage Web Services > Groups Allowed for REST.**

2. Check the list to see if your Group is selected. If it is not selected, select it.

3. Click Finish.

Error Message	Solution
`EWWrongDataException: Session could not be created`	If you get this error message when logging in, check your REST group permissions with the information mentioned above.

Inbound Email

Check these sections for issues that revolve around inbound email. You should use a different inbound email for every KB.

Disabled inbound email or emails not appearing

After setting up inbound email, make sure it is enabled. To do so:

1. Navigate to **Setup > Email and SMS**.

2. Click **Configure Inbound Email**.

3. Open the Inbound Email record, and navigate to the Account tab.

4. Under Activity, make sure that the account is not disabled.

CC field blank or not updated properly

If you click Add this Contract as a Recipient and the CC field is blank or is not properly updated with the correct email address, it's likely the system does not recognize the email address that was entered as the inbound email account. This is likely because the account was entered incorrectly, but also could be because the account has been deleted or configured improperly.

In this case, the system automatically assigns the inbound email account to the out-of-the-box "Anonymous" user. A blank field occurs if the Anonymous user has been deleted, or does not have the proper permissions.

To solve this issue, follow these steps:

1. Go to **Setup > Email and SMS.**

2. Under Inbound Email Accounts, click **Configure Inbound Email**.

3. Open the Inbound Email record, and navigate to the Access tab.
4. Under "On record update if the sender is not recognized," make sure to click the radio button next to "Update the record from this user account."
5. Make sure that there is a value in the look-up field underneath "Update the record from this user account." This value should be a user that has update permissions, such as admin; this is the same location where the anonymous user would be listed if it was not deleted.

6. Save the record.

Custom headers removed

When a mailbox is created at the Exchange mail server and used as an inbound email address, custom headers about the record ID and table are added to the email when the Add this Contract as a Recipient button is pressed. This button also puts the inbound email address in the CC field. When messages sent using the Outlook app arrive in the inbound email inbox, the headers are still present. However, when Agiloft processes those emails, the server may remove the headers.

These custom headers are:

- x-agiloft-record-id
- x-agiloft-table-id

To authorize these custom headers, follow these steps. To do so, you must have access to the inbound email inbox.

1. Log in to the inbound email account, and open Outlook.
2. Install the Outlook app for this account.
3. Connect to your KB, using an admin-level login and password.
4. Create a new message and add a contract record as a recipient. Ensure that the inbound email address is added to the CC field.
5. Copy the email address in the CC field and add it to the To field. This email address should remain present in the CC field.
6. Enter some arbitrary text in the Subject and Body fields of the email, then click Send.

This results in the email being routed correctly to the record you selected in step 4 above, and authorizes the custom headers listed above for all users sending emails through the Outlook app for the particular organization.

Error Message Glossary

This section compiles the error message and solution tables.

Error Message	Solution
`The service required to use this feature is turned off. Check your privacy settings.`	Open Microsoft Outlook > Options > Trust Center > Trust Center Settings > Privacy Options > Privacy Settings > Turn On optional connected experiences.
`EWWrongDataException: Session could not be created`	If you get this error message when logging in, check your REST group permissions with the information mentioned in the Logging In section.