

O365 – HOMEBASE INDOC ADD -IN QUICK GUIDE

ENABLE THE HOMEBASE inDOC ADD-IN


The screenshot shows the Outlook web client interface. On the left, the 'Settings' pane is open, and the 'Mail' option is selected under 'My app settings'. On the right, the 'Manage add-ins' pane is open, showing a list of installed add-ins. The 'HomeBase inDoc' add-in is highlighted, and its checkbox is checked. Red boxes and green circles with numbers 1-5 indicate the steps: 1. Settings gear icon, 2. Mail option, 3. General option, 4. Manage add-ins option, 5. HomeBase inDoc checkbox.



1. Login to O365 Web client, using one of the URL's below:

<http://portal.office.com>

OR,

<https://login.microsoftonline.com>

- **Step 1** – Click on the > **Settings/Gear** icon. 
- **Step 2** - Find **My app** settings and select > **Mail** option, under “Your app settings”
- **Step 3** - Expand the > **General** option.
- **Step 4** - Click on the > **Manage add-in**.
- **Step 5** - Turn on the **HomeBase inDoc** by checking the check box.

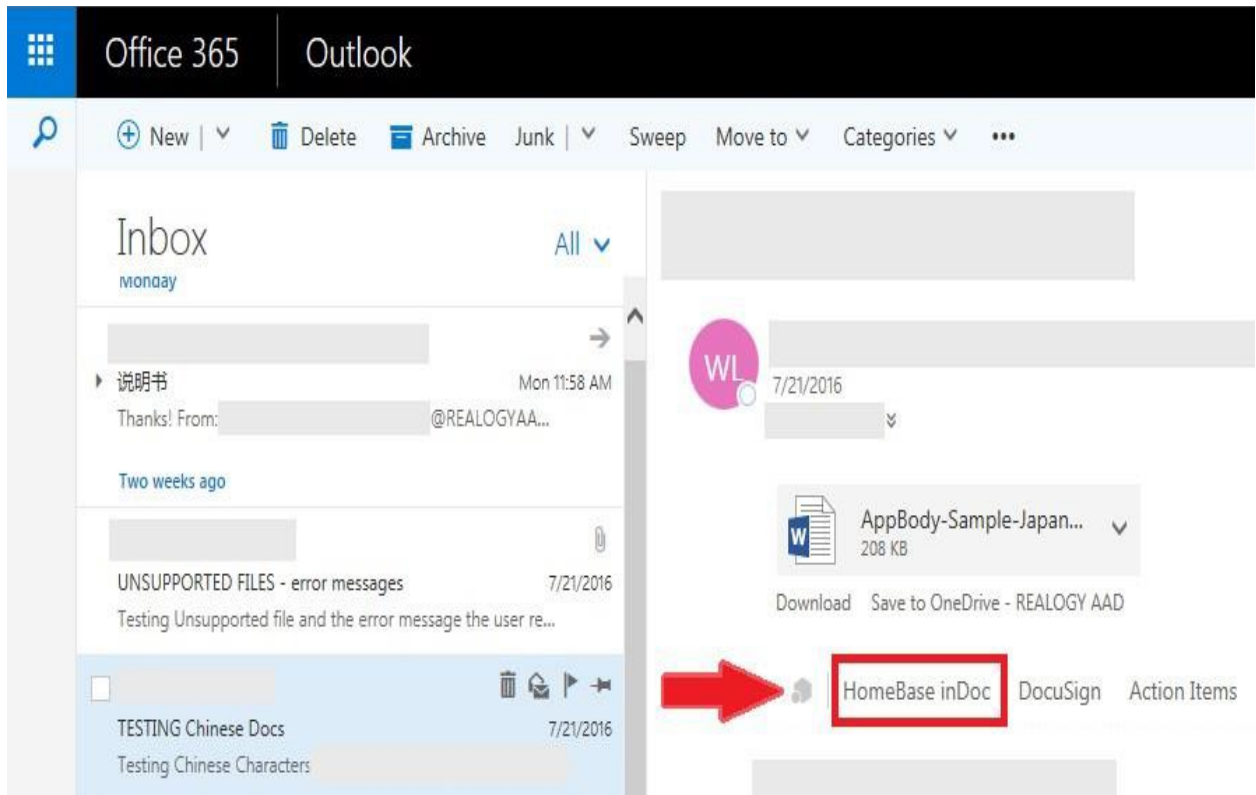
2. To confirm that the add-in was enabled > return to your Outlook mail inbox by clicking on the > , and select the **Outlook Mail app tile** 

NOTE:

- Once the **HomeBase inDoc** add -in is enabled through the **0365/Outlook web client**, the add-in will also be available on the **Outlook mail client**.

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CONFIRMING THE HOMEBASE inDOC ADD-IN IS ENABLED



- Open an email from your inbox.
- Check if the **HomeBase inDoc** button displays as shown in the screen above.

NOTE:

- It might take up to 1min for the HB add in to display - **refresh your web browser if the Home Base add in does not appear.**

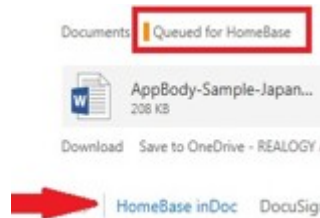
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ENABLING THE HOMEBASE CATEGORIES

To enable the two categories automatically and ensure that all your emails sent to **HomeBase inDoc** are **tagged** correctly, go through the following steps:

Enable to Categories:

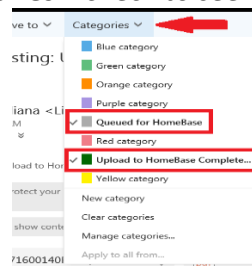
- Open an email and click on the > **HomeBase add-in**. *This action only has to be done once.*



- The email will be tagged as **Queued for HomeBase**, as shown in the above screen.

Checking if both categories are available:

1. Open an email and click on the **Categories** – *check to see if the 2 categories display in the list.*

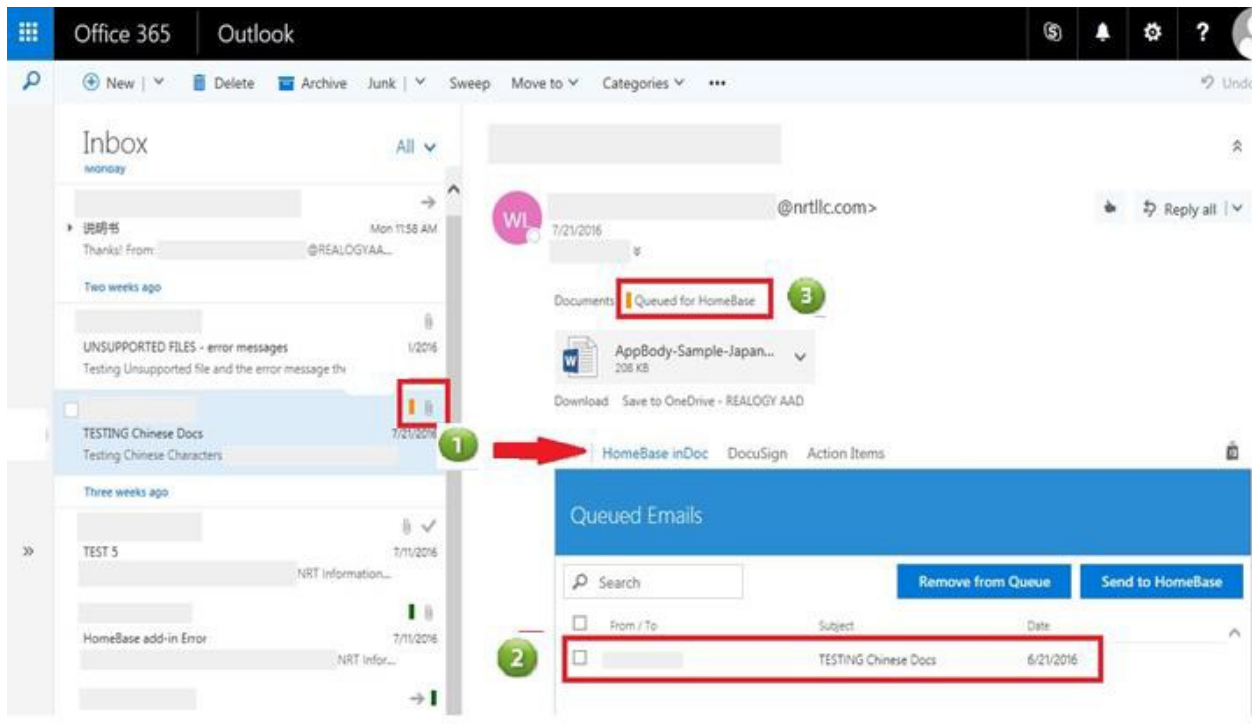


NOTE:

- ALL emails sent to the **HomeBase queue** and the ones completely submitted to **HomeBase inDoc** will be categorized as follows:
 1. All email submitted to the **HomeBase Queue** will be categorized as **Queued for HomeBase**.
 2. All the emails completely submitted/sent to **HomeBase inDoc** will be categorized as **Uploaded to HomeBase Completed**.

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SENDING ONE EMAIL TO HOMEBASE QUEUE



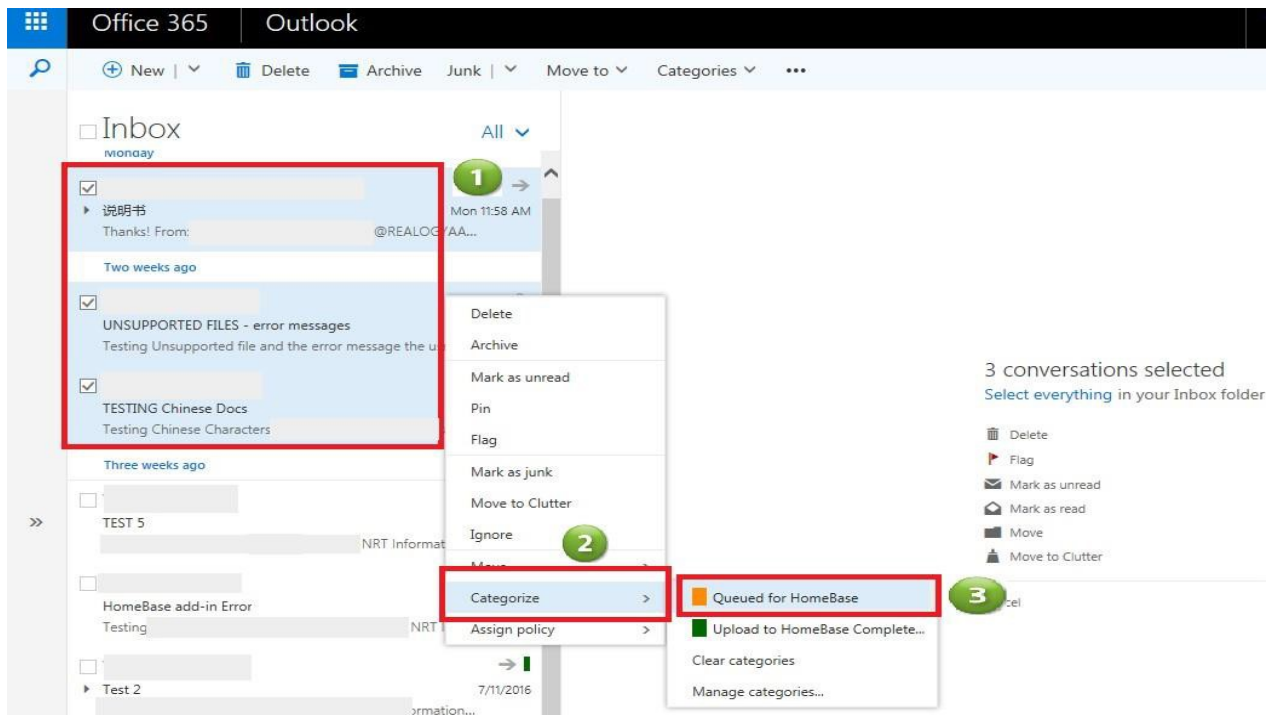
- **Step 1** - Select an email and click the > **HomeBase inDoc** button
- **Step 2** - The email is added and displayed in the **HomeBase** queue
- **Step 3** - The added email is categorized as **Queued for HomeBase**
 - **Note: if emails are not automatically categorized, please refresh your screen.**
- To complete the submission to HomeBase inDoc – see the steps detailed below:
 - [SELECTING EMIALS FROM THE QUEUE](#)
 - [SENDING THE SELECTED EMAILS TO HOMEBASE inDOC](#)

Note:

- The queued email(s) is **tagged** with the **color indicator** selected for the **Queued for HomeBase** category.
- Deleted emails cannot be added to the **HomeBase** queue – if you want to add these emails, move them to the **Inbox** folder first!
- Please note that you can only add regular emails to the HomeBase Queue. e.g Calendar Invites, Auto Generated emails, etc....are not supported and will not be added to the queue.

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SELECTING and SENDING MULTIPLE EMAILS TO THE HOMEBASE QUEUE



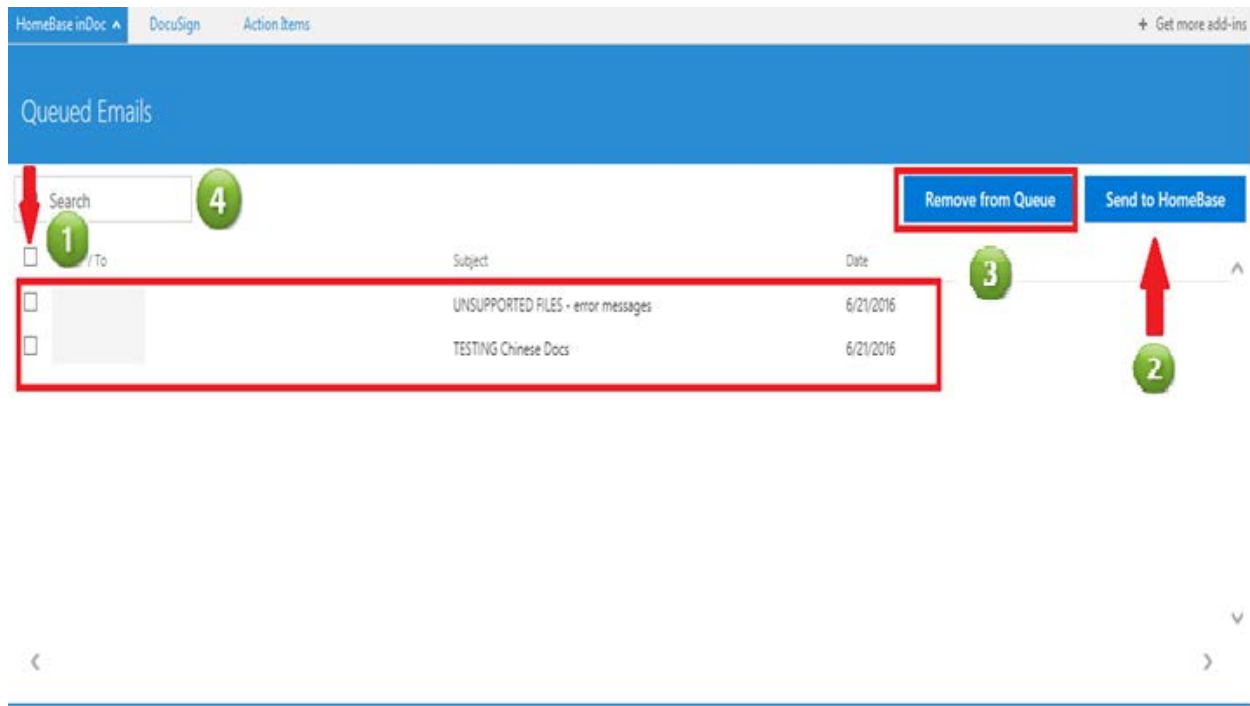
- **Step 1** - From your inbox or any email folder (*excluding the Deleted folder*) > select a set of emails you intend to send to the **HomeBase Queue**.
- **Step 2** - **Right click** on any of the selected emails and > select **Categorize** from the cascading menu.
- **Step 3** - Select > **Queued for Homebase** category from the category menu.
- To complete the submission to HomeBase inDoc – see the steps detailed below:
 - [SELECTING EMIALS FROM THE QUEUE](#)
 - [SENDING THE SELECTED EMAILS TO HOMEBASE inDOC](#)

NOTE:

- If the category *Queued for HomeBase* does not display for selection, follow the steps documented in [ENABLING THE HOMEBASE CATEGORIES](#) to enable the categories.
- *Deleted emails cannot be added to the HomeBase queue – if you want to add these emails, move them to the Inbox folder first!*
- *Please note that you can only add regular emails to the HomeBase Queue. e.g Calendar Invites, Auto Generated emails, etc....are not supported and will not be added to the queue.*

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SELECTING EMAILS FROM THE QUEUE



1. Access the **HomeBase queue**, if not already open:
 - Open an email from your inbox and click the > **HomeBase inDoc** button – *all the queued emails tagged as Queued for HomeBase will display in the queue.*
 - Note: If all the emails don't show on the first screen, scroll down to the bottom to retrieve all the emails added to the queue.*
2. Sending emails to **HomeBase inDoc**:
 - **Step 1** - select the email(s) you want to send to HomeBase by marking the checkbox in front of the email(s).
 - **Step 2** – click on the **Send to HomeBase**
3. To remove the emails from **HomeBase queue**:
 - Follow **Step 1 and 2** to select the email(s) you want to remove from the queue and > click the **Remove from Queue** button.
4. To **Search** for queued email(s):
 - Enter a specific set of words into the **Search** field and tab out > the queued list is filtered by the matched results to the **From/To** field.

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SENDING THE SELECTED EMAILS TO HOMEBASE inDOC

HomeBase inDoc

Send Emails to HomeBase

Homebase Email @mycphomebase.com

Subject

(Please select one or enter it in)

Please enter either the client's name or property address

Client Name Property Address

(e.g. John Smith) (e.g. 123 Main St)

Move emails to trash after sending them to HomeBase No

Cancel Send

1 2 3 3 4 5 6

From / To	Subject	Date
	TESTING Chinese Docs	6/21/2016

After the **Send to HomeBase** button is clicked – the user will be required to enter the following information:

- **Step 1 – HomeBase email** - This field is required and cannot be left blank.
 - To select the email address setup for your office > type in the first letters of your office name in the HomeBase email field > a drop down listing all the HB office email addresses will display > click and select the HB email address setup for your office.
 - If you don't know the HB email address set up for your office, **ask an office manager or sales support admin** for support.
- **Step 2 – Subject line** – This field is required and cannot be left blank
 - Select a subject from the drop by typing in the field a subject line (e.g. Email and Correspondence) > a drop down listing all the subject lines will display.
- **Step 3 – Client Name or Property Address** - one of the two fields is required.
- **Step 4** – click the **Send** button, to complete the submission to HomeBase inDoc
 - After emails are **successfully submitted to HB**, **all** the submitted emails are categorized as **Upload to HomeBase Completed**.
 - The submitted emails are removed from the HomeBase queue.
- **Step 5** – click on the **Cancel** button to return to the HB queue.
- **Step 6** – if you want to automatically delete the submitted emails from your email inbox or folder, turn ON the option “Move emails to Trash after sending to HomeBase”

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IMPORTANT:

- ✓ The email content and the attachments sent to HomeBase inDoc are merged into one single PDF file.
- ✓ If the size of the combined emails and attachments are larger than 18MB, the PDF files are fragmented in multiple emails and parts and sent to HomeBase inDoc.
- ✓ An error message will display if the file type of the attachments is not supported and cannot be converted to PDF (*i.e. invalid file type*).
- ✓ Only MS Office, PDF's, JPEG's, JPG's, GIF's and PNG's file types will be processed to HomeBase inDOC.
- ✓ Apple Pages and Numbers, .zip and .exe files are not supported and will not be processed to HomeBase inDoc.
- ✓ The user will not be able to use the HomeBase add-in while on a Mobile device.
- ✓ Disable the caching on the Outlook Desktop Client, to ensure the emails are added and removed timely from the HomeBase queue - follow these instructions: <https://support.office.com/en-us/article/Turn-on-Cached-Exchange-Mode-7885af08-9a60-4ec3-850a-e221c1ed0c1c?ui=en-US&rs=en-US&ad=US>

For any questions please call:

NRT Help Desk: (877) NRT-HELP (877) 678-4357

MON 6am - SAT Midnight | SUN 7am - Midnight (Eastern Times)

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