

Outlook plugin Installation and User Guide

Access marketing and sales assets, track emails and view contact activity in Mindmatrix directly from Outlook

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Feature

The Mindmatrix Outlook plugin is a convenient and easy to use tool to help sales team's track contact and lead activity. If you have an existing account in Mindmatrix, installing the Outlook plugin will enable you to:

- Access sales and marketing assets shared with your Mindmatrix account
- Add and sync new leads and contacts directly to your account in Mindmatrix
- Send tracked emails to contacts and leads, and view their activity from your desktop
- Quickly access sales playbooks and other tools shared to your Mindmatrix account

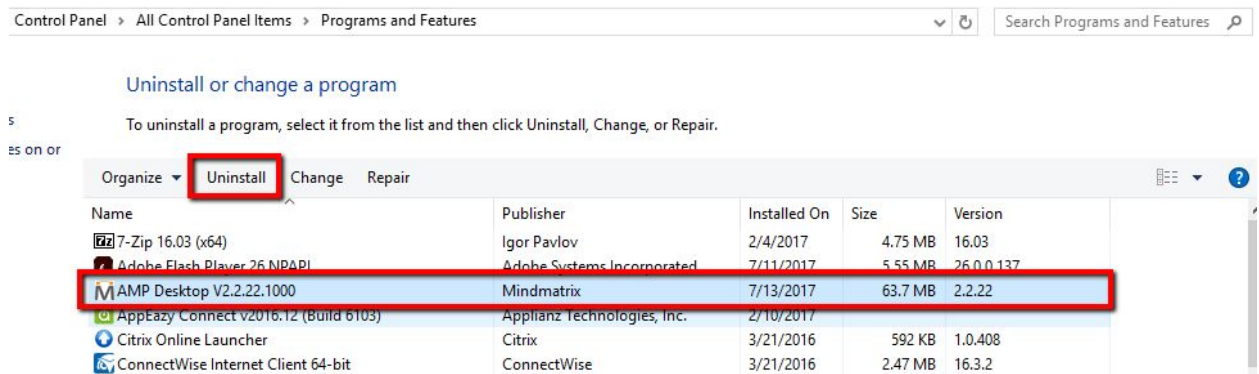
The Outlook plugin is available for users with Windows PCs and is compatible with

- Windows 7
- Microsoft Exchange
- Windows 8
- Windows 10
- Windows Server 2016

How should existing users update their Outlook plugin?

If you have the previous version of the Mindmatrix Outlook plugin installed on your computer, you will need to uninstall it.

1. From your Desktop, click on the Windows start menu
2. Visit your Control panel -> Programs and features -> select "AMP Desktop 2.0" and click uninstall.



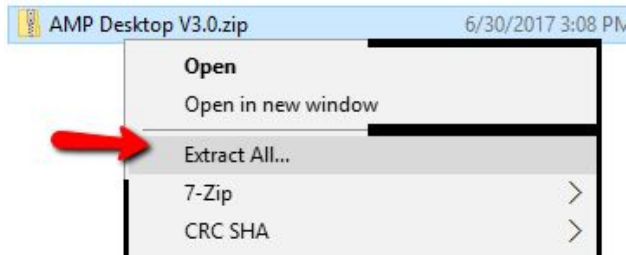
3. When uninstalling the system will ask you to allow to make changes to your system. You will need to click yes to allow the uninstall to run properly.
4. After the final screen you can close the uninstall, and move onto the next section.

How do I install the latest version of the Outlook Desktop Widget?

1. Close Outlook. Download from your Mindmatrix account installation. This can be found under your Mindmatrix portal under "Quick links -> Desktop Widget"

You can also download using this link: <https://mm.amp.vg/#desktopwidget>

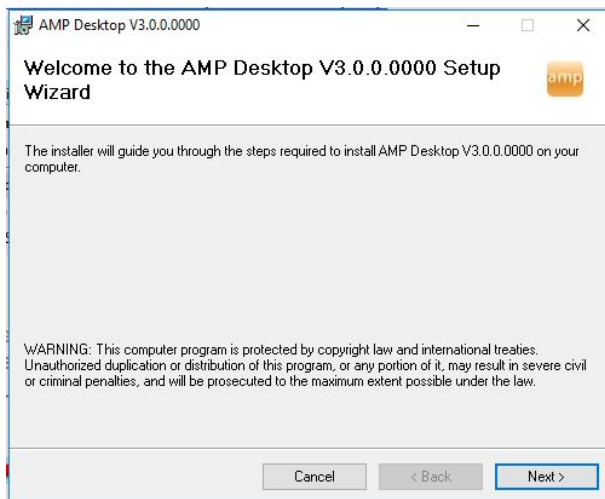
2. Once the zip file is downloaded, right click the zip file and extract all files.



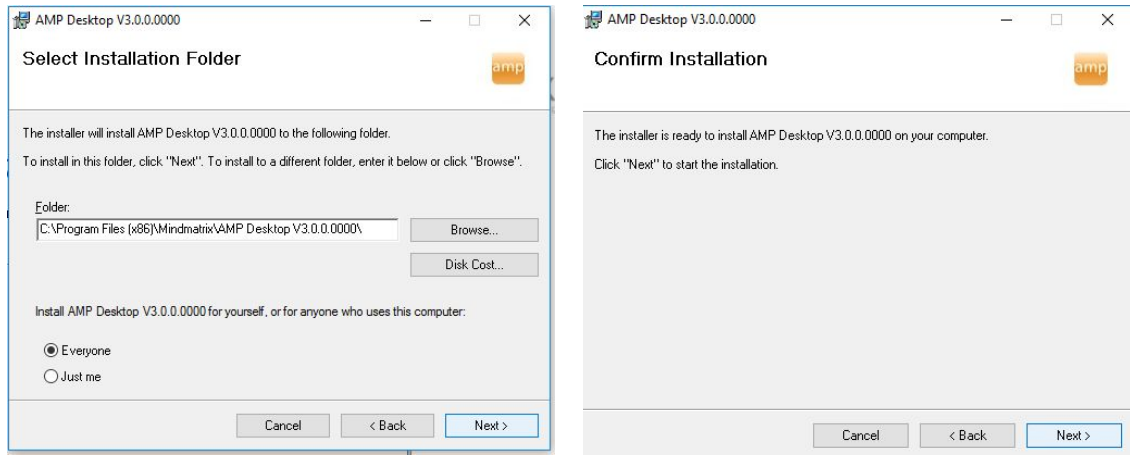
3. With the newly extracted files showing, explore the folder until you have located "setup.exe," (the second file is a supporting file, which does not need to be run).

Name	Date modified	Type	Size
AMP Desktop.msi	6/30/2017 3:09 PM	Windows Installer ...	5,174 KB
setup.exe	6/30/2017 3:09 PM	Application	687 KB

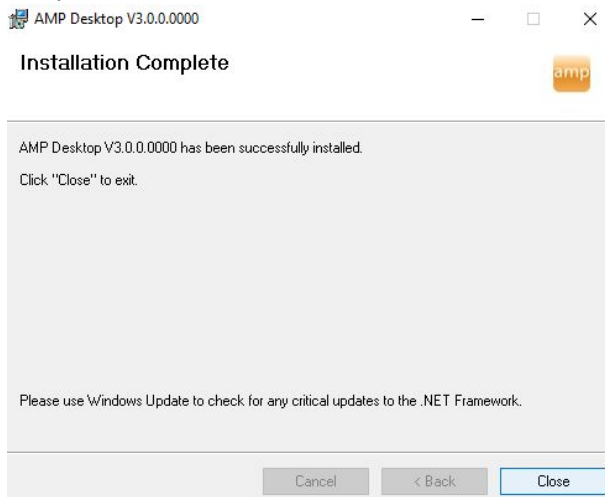
4. The setup.exe file will open the installer which will ask you to click next through the coming prompts.
5. Click next



6. Choose a file location, default is the best selection



7. After clicking next on this prompt your windows operating system will ask to trust the publisher, select Yes and continue to complete the installation.



8. Click Close and then continue to your desktop to open your Desktop Widget and Login.

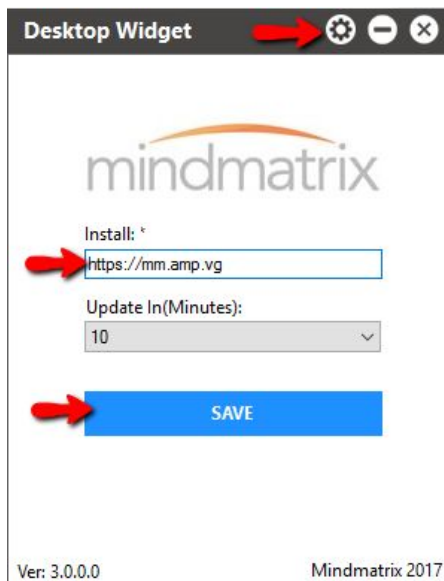
How do I login?

If you had the old plugin, it should remember your username and password settings.

If you are a first-time user you will need to select your install URL and then login with your credentials.

To login:

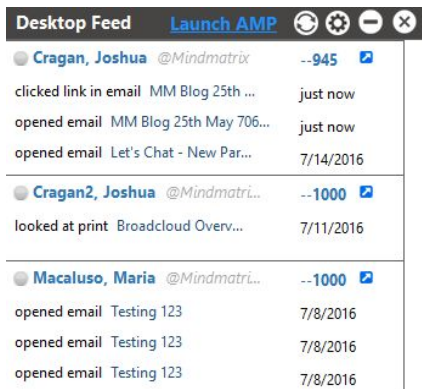
1. Open the app and select the gear box
2. Type in the URL for the installation that you login to. (This should be the same URL that you visit whenever you log into the desktop version of Mindmatrix).



3. After you click "save" you may enter your username and password. (Note: This is the same username and password you use to login Mindmatrix).

How do I view my contact/lead activity feed?

Upon logging in, you will see your contact and lead activity feed.



Contact Name	Activity	Date
Cragan, Joshua @Mindmatrix	clicked link in email MM Blog 25th ...	just now
	opened email MM Blog 25th May 706...	just now
	opened email Let's Chat - New Par...	7/14/2016
Cragan2, Joshua @Mindmatri...	looked at print Broadcloud Overv...	7/11/2016
Macaluso, Maria @Mindmatri...	opened email Testing 123	7/8/2016
	opened email Testing 123	7/8/2016
	opened email Testing 123	7/8/2016

Ver: 3.0.0.0

Mindmatrix 2017

Sending assets, adding contacts to Mindmatrix campaigns and more from your Live Feed

5. Within the desktop widget, you can take action on any specific contact by clicking the blue arrow button beside the contact record. Here is a Mindmatrix account below:

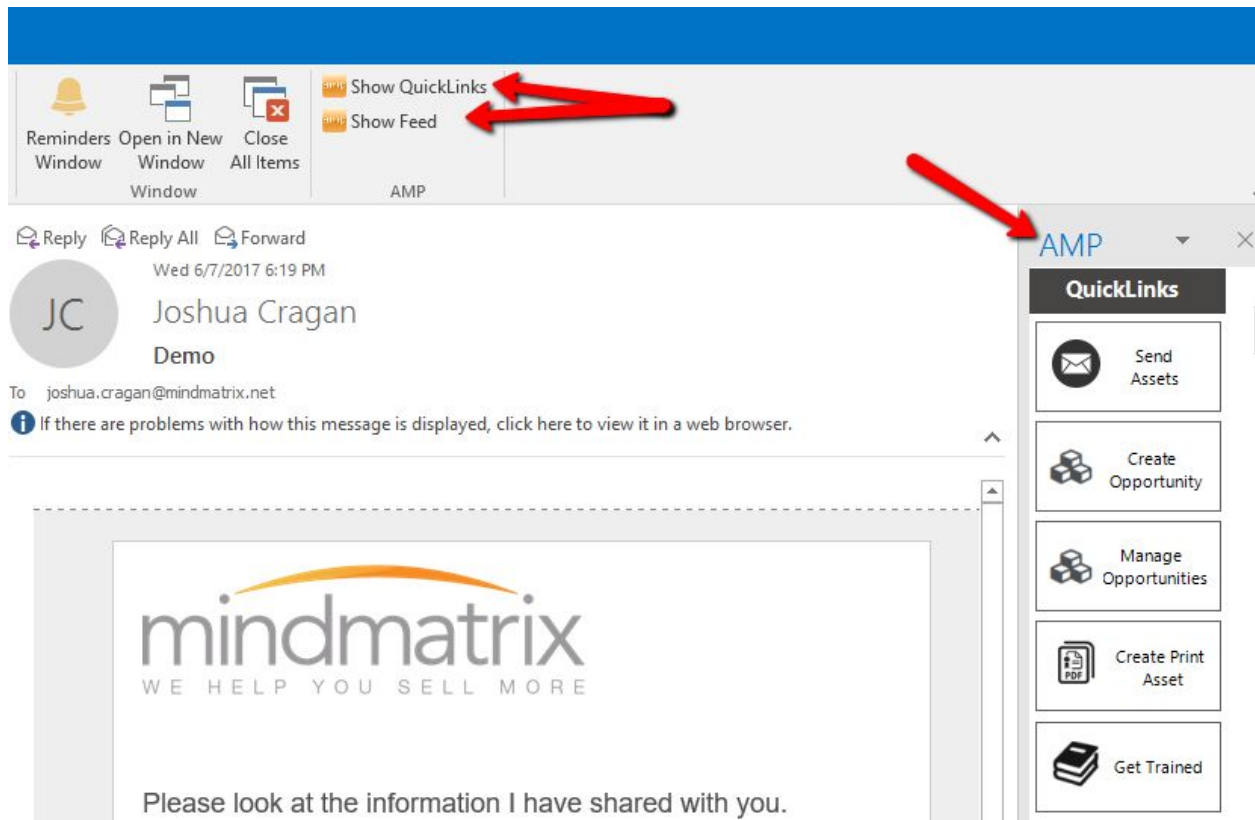


Contact Name	Activity	Date
Cragan, Joshua @Mindmatrix	clicked link in email MM Blog 25th ...	just now
	opened email MM Blog 25th May 706...	just now
	opened email Let's Chat - New Par...	7/14/2016
Cragan2, Joshua @Mindmatri...	looked at print Broadcloud Overv...	7/11/2016

- Send Asset
- Add to Drip
- Send Email
- Add to Internal Playbook

How do I access my Mindmatrix Quick Links from Outlook?

1. After logging into the desktop widget, open Outlook.
2. You will see a sidebar from your account created in your display.



This sidebar can be toggled under your "view" panel within Outlook.

To toggle your sidebar from view,

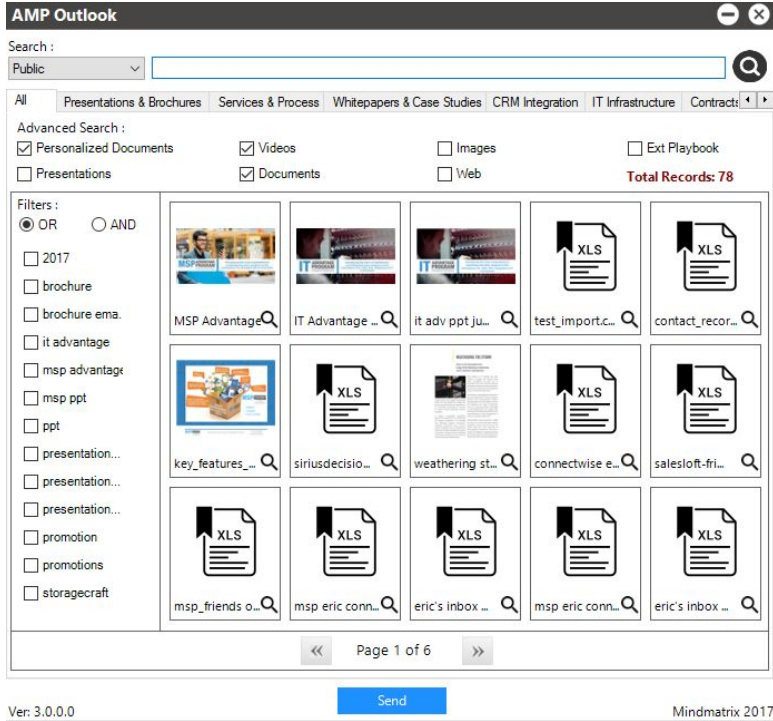
1. Click on Views in Outlook
2. Click on Show Sidebar

The Quicklinks sidebar will contain the following options:

- Send Assets
- Create Opportunity
- Manage Opportunities
- Create Print Asset
- Get Trained

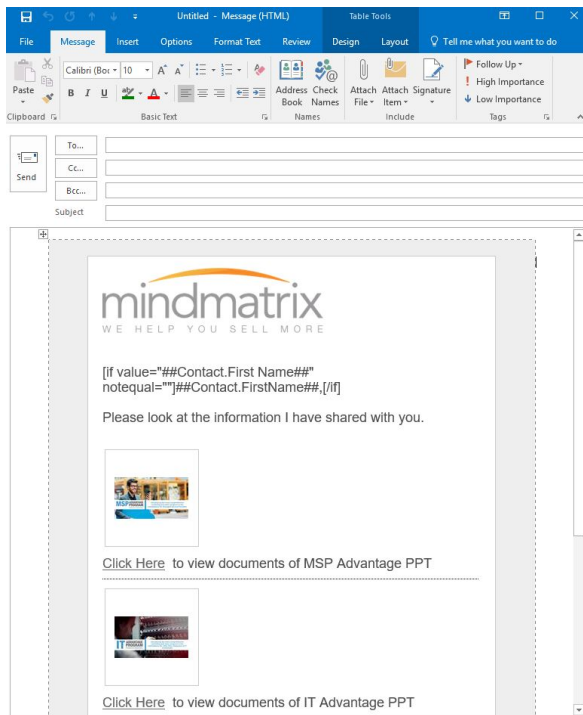
Sending Assets

Send assets will allow you to choose from print assets and documents hosted and built inside of your Mindmatrix account instance.



Choose any personalized print assets, documents from your gallery or other uploaded files from your Mindmatrix account.

After you click "send" you will have an email will automatically be created with thumbnails and links back to the assets you selected.



Creating Opportunities

Choosing the Create Opportunity option on the quick links sidebar, will open the opportunity section of your Mindmatrix account.

Add Record (Opportunities)

Opportunity Details Win-Loss Details Enterprise High Level Use Cases MSP / IT Market

Opportunity Name <TEXT> T

Account Name <TEXT> T

Stage Live v

Stage Details <TEXT> T

Expected Closed Date * <DATE> 📅

Amount <CURRENCY> \$

Market v

Type v

Description <TEXTAREA> T

Close Save

Managing Opportunities

Choosing this option will open up your opportunities section within Mindmatrix.

Creating Print Assets

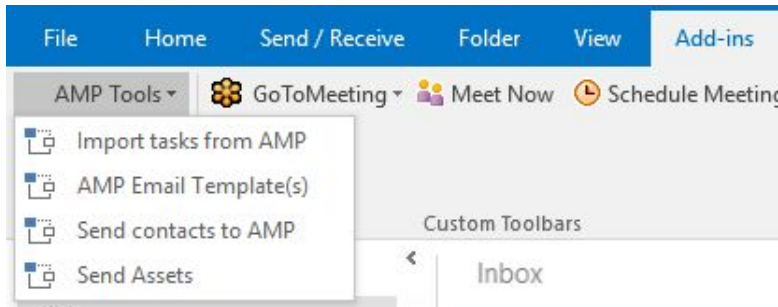
Choosing this option will open up your Print section within Mindmatrix.

Get Trained

Choosing this option will open up your "internal playbook" section of Mindmatrix account. You will find playbooks and certifications shared with you here.

How do I use Add-in options for the plugin with Outlook?

With Outlook open, visit the top ribbon and click on "Add-ins" tab. Notice Mindmatrix account tools option.



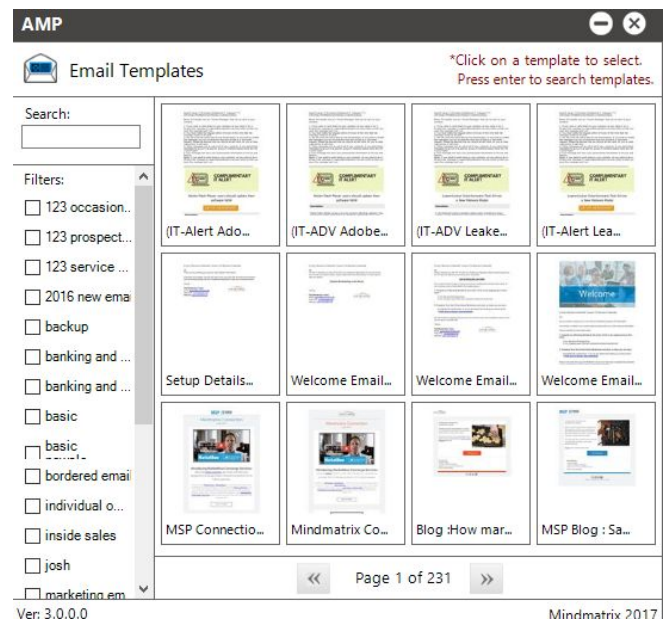
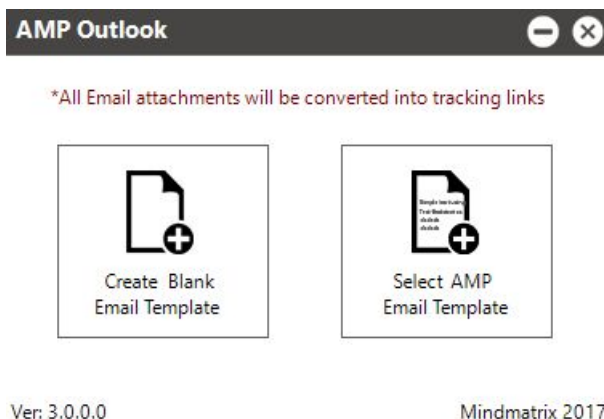
- Import tasks from Mindmatrix account
- Mindmatrix account Email Templates
- Send Contacts to Mindmatrix account
- Send Assets

Importing tasks from Mindmatrix account

You can pull task or to-do activities from Mindmatrix into Outlook under the task section. To do this, click the "Import tasks from AMP" button.

Accessing email templates

Clicking on AMP email templates will allow you to access email templates loaded into your Mindmatrix account, or to load a blank email template. Choose any template available to edit and send directly from Outlook.



Sending contacts to your Mindmatrix account

This will send all of your Outlook contacts to your account in Mindmatrix.

Importing tasks from your Mindmatrix account

If you happen to use tasks inside of Outlook you can pull task or todo activities from Mindmatrix account into your Outlook under the task section.

Sending Assets

Sending assets will allow you to choose from print assets and documents from your Mindmatrix account.