

# JGC Outlook Email to Redtail CRM Task App™

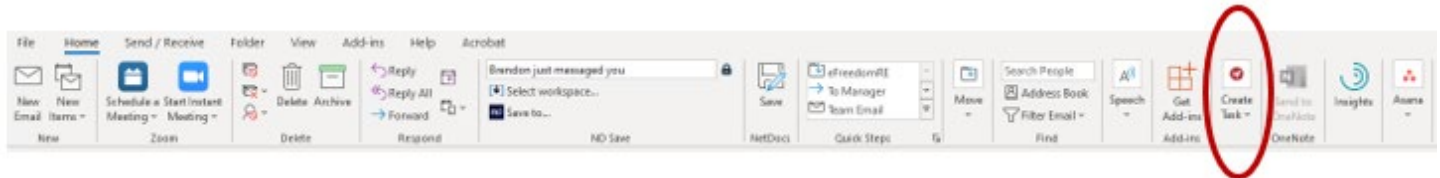
This is a very simple tool designed by JGC and built by a Redtail-approved programmer. Redtail does not provide tech support on this tool.

This tool will convert an Outlook Email into an open Redtail Task. It is meant to convert emailed requests into tasks assigned to you or other users within the Redtail CRM. This tool can also be used to quick-copy an email into Redtail and mark it complete so it is logged.

It is your responsibility to install, test and use it when appropriate.

Installation instructions are below:

1. Install the tool following the Outlook Desktop instructions. <https://docs.microsoft.com/en-us/office/dev/add-ins/outlook/sideload-outlook-add-ins-for-testing#sideload-an-add-in-in-outlook-on-the-desktop>
2. When installing, you'll be able to choose 'install via URL' or 'File'. Please choose 'URL' and insert: <https://www.businessopsexperts.com/manifest.xml>
3. Once you have installed the plug-in, close your Outlook program and reopen. You should see a Redtail button in your Outlook tool bar.



4. Click once on any email in Outlook, click on the Redtail button, and follow the prompts.
5. View the task within Redtail.

FYI: The search field is limited by Redtail's search algorithm and limited to first name, last name, business name, or email address.

**RETAIL DOES NOT PROVIDE TECH SUPPORT ON THIS APP. IT IS SOLELY OWNED BY JGC.**

**THIS TOOL IS FOR YOUR FIRM'S USE ONLY.**