

# CORETECH

## In-Bot Setup (Beta Version 1.0)

This document provides a step by step guide to install and configure the Inbot Outlook Plugin. Prior to proceeding to Step 1, please download the In-Bot installer <http://Inbot.us>

### Step 1

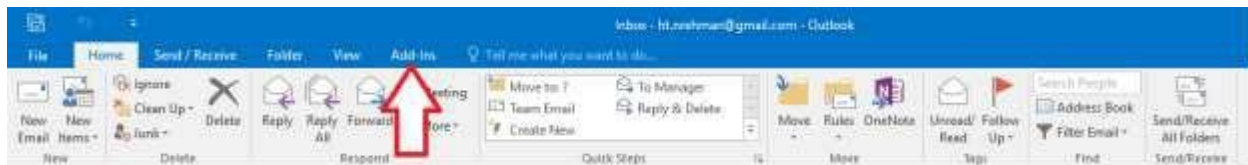
Double click the ZIP file and select Setup.exe from the directory listing.

Name	Type	Compressed size	Password p...	Size
inBot Plugin Manual	Adobe Acrobat Document	535 KB	No	571 KB
InBotSetup	Windows Installer Package	3,557 KB	No	3,924 KB

Follow the standard windows installer prompts as normal. If asked to “allow this application” please select yes.

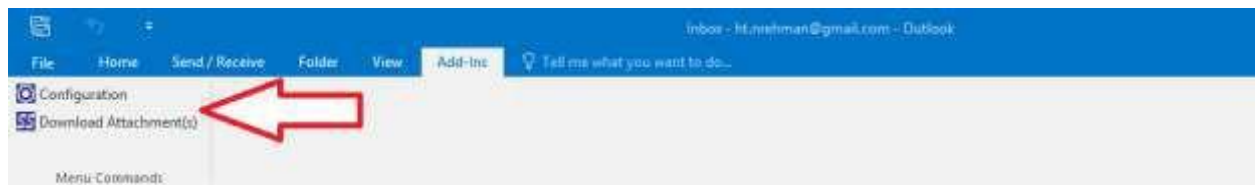
### Step 2

Verify the outlook plugin has installed correctly by opening your outlook version and checking to see if a new menu option (Add -Ins) located in the ribbon exists. If the Add-Ins option appears, please click on it. If the Add-Ins option does not appear, please email [sjaved@htdecisions.com](mailto:sjaved@htdecisions.com) or [sherazjaved@gmail.com](mailto:sherazjaved@gmail.com)



### Step 3

Once you have the Add-Ins option and have clicked on it you will see two options, Configuration and Download Attachment(s)

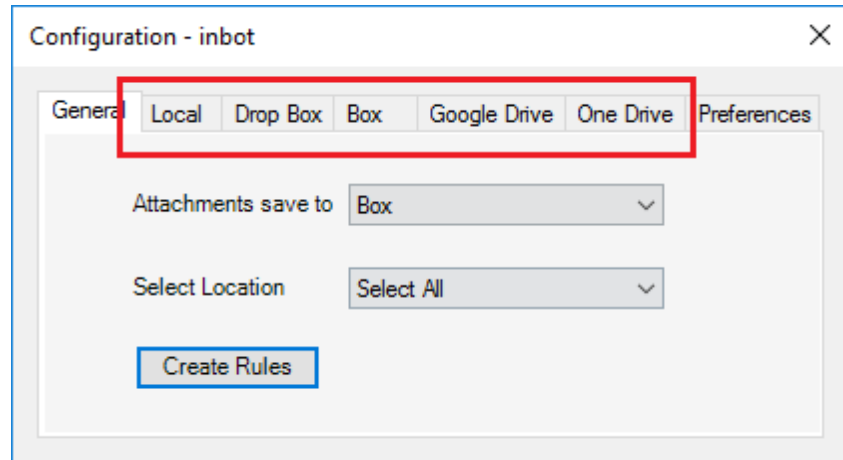


Please click on the Configuration option

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## Step 4

You should now see the Inbot Configuration window open with multiple location options as seen below in this screenshot:

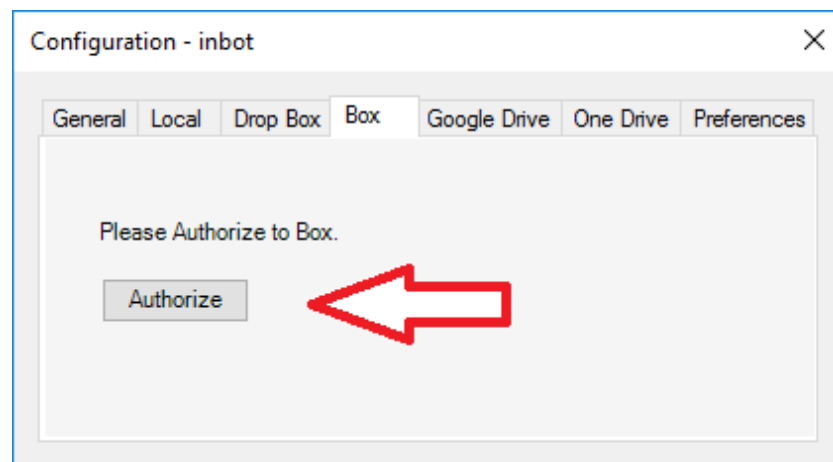


NOTE: for guidance purpose, we will be choosing **Box** option but you should select the storage location you would like to store all email attachments in.

***PLEASE NOTE THAT IF YOU SELECT THE LOCAL OPTION YOUR EMAIL ATTACHMENTS WILL ONLY BE ACCESABLE FROM THAT SINGLE PC. YOU MUST SELECT ONE OF THE ONLINE REPOSITORIES TO ACCESS YOUR ATTACHMENTS FROM ANY PC.***

## Step 5

Please select your option now, it will ask you to authorize:



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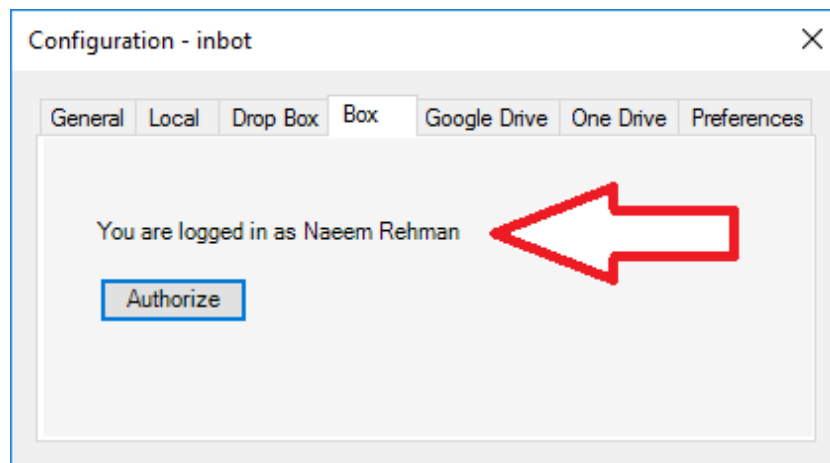
## Step 6

After clicking on “Authorize” you will see a new pop-up asking you to provide box credentials. Please see below picture for details:



## Step 7

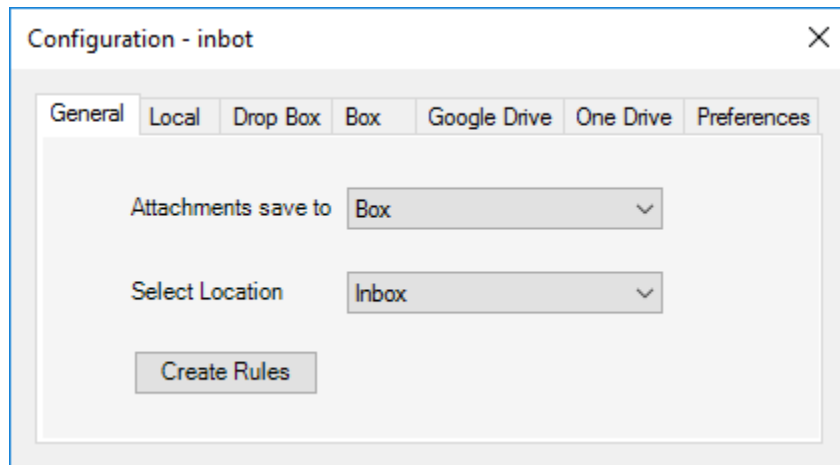
After providing credentials and allow box to for access the pop-up will close and you can see your login name on label, as shown below:



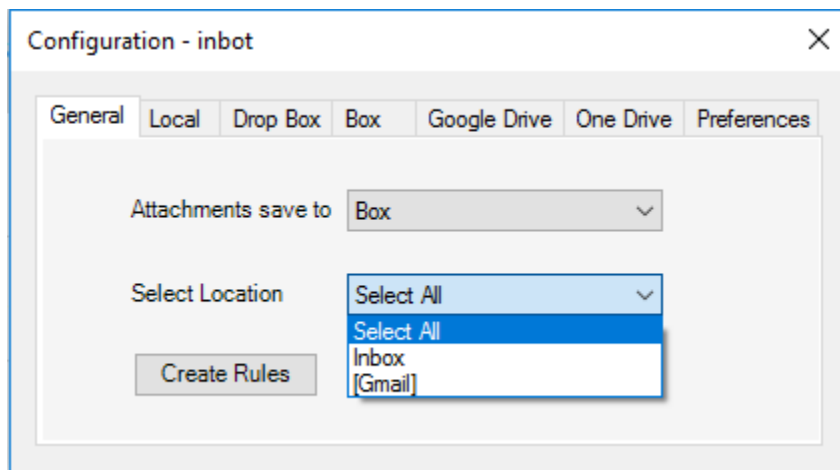
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## Step 8

After you have authorized your account please click on the General Tab of the configuration window. And make sure you have selected the preferred location for your email attachments

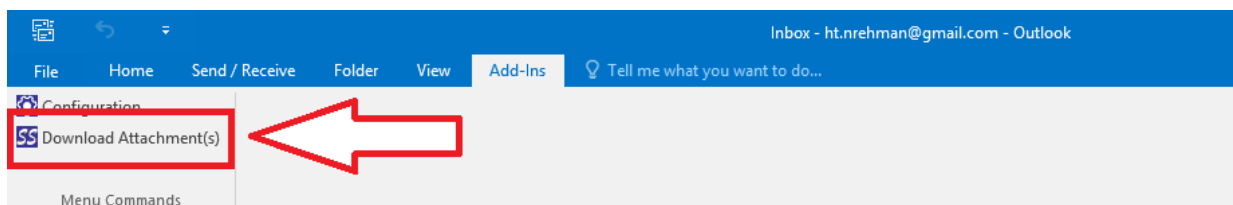


You can also select a particular folder of your email account using location dropdown:



Once you have authorized your selection please click the red X in the top right corner of the Settings window to close. After closing, please reopen the configuration page and verify your selection in the General tab is correct. If it did not save, please contact: [sjaved@htdecisions.com](mailto:sjaved@htdecisions.com) or [sherazjaved@gmail.com](mailto:sherazjaved@gmail.com)

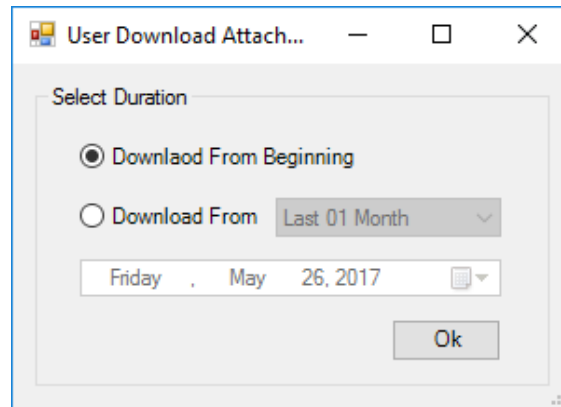
You can now click on the Download Attachments button found in the Add-Ins menu:



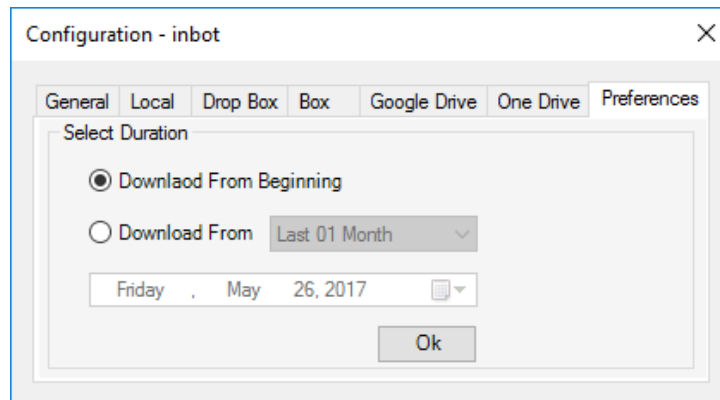
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## Step 9

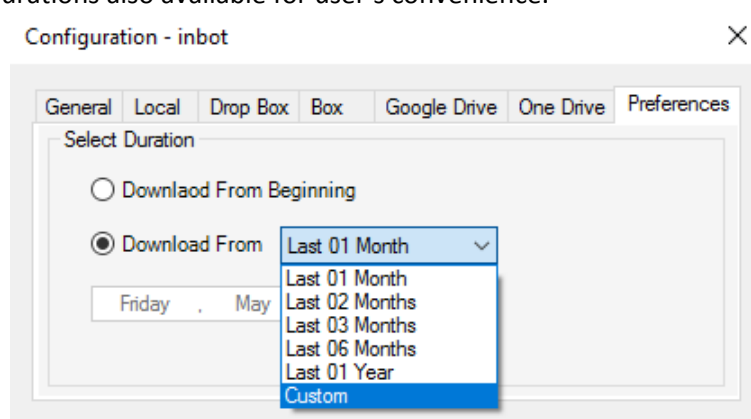
When you click Download Attachment(s) button you will get a pop-up as shown below. You will be asked if you want to download all attachments of a selected folder/email or download from a specified duration. If you select a specified duration application will only download attachments received after the mention date.



You can also configure the duration in preferences tab in configuration window. Please see details:



Some pre-defined durations also available for user's convenience.

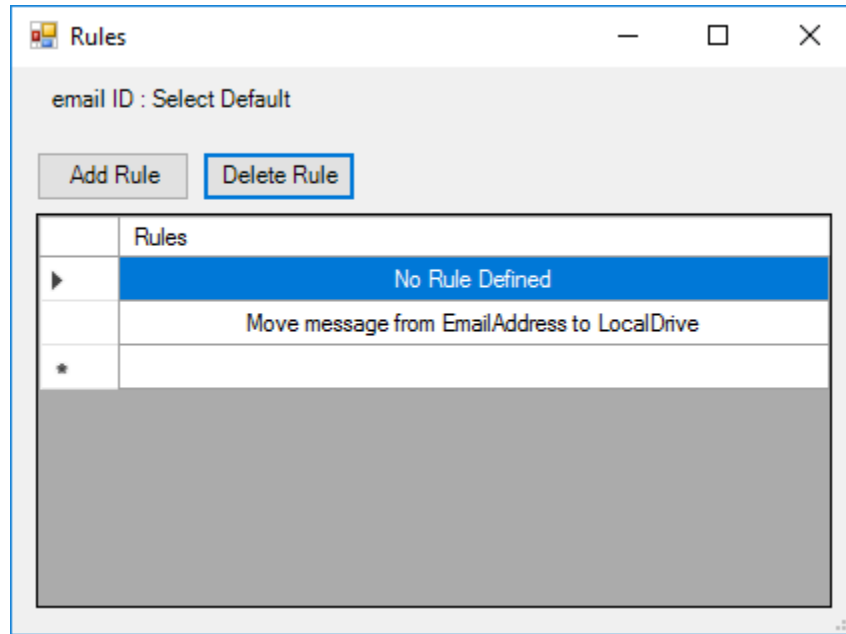


**Congratulations you have installed Beta Version 1.0 of the Inbot plugin by: CoreTech**

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## Setup Inbot attachment download rules

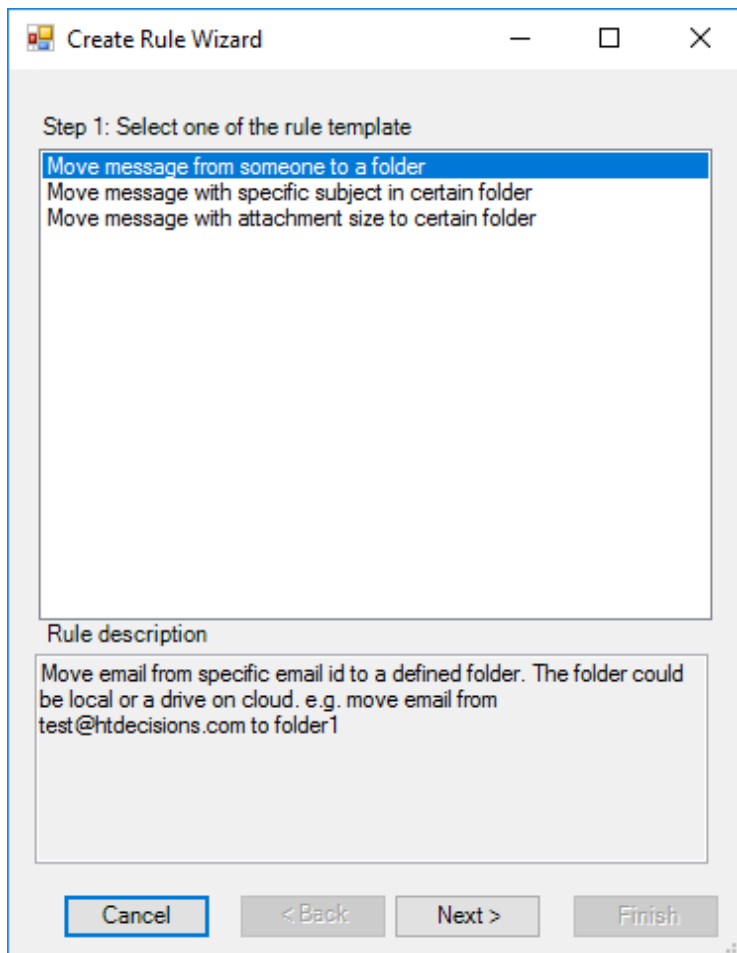
Another important feature of Inbot is the criteria based download. Users can specify attachment downloads based on defined rules. Rules definition pop can be seen on clicking “Create Rule” button on configuration pop-up.



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## Step 1

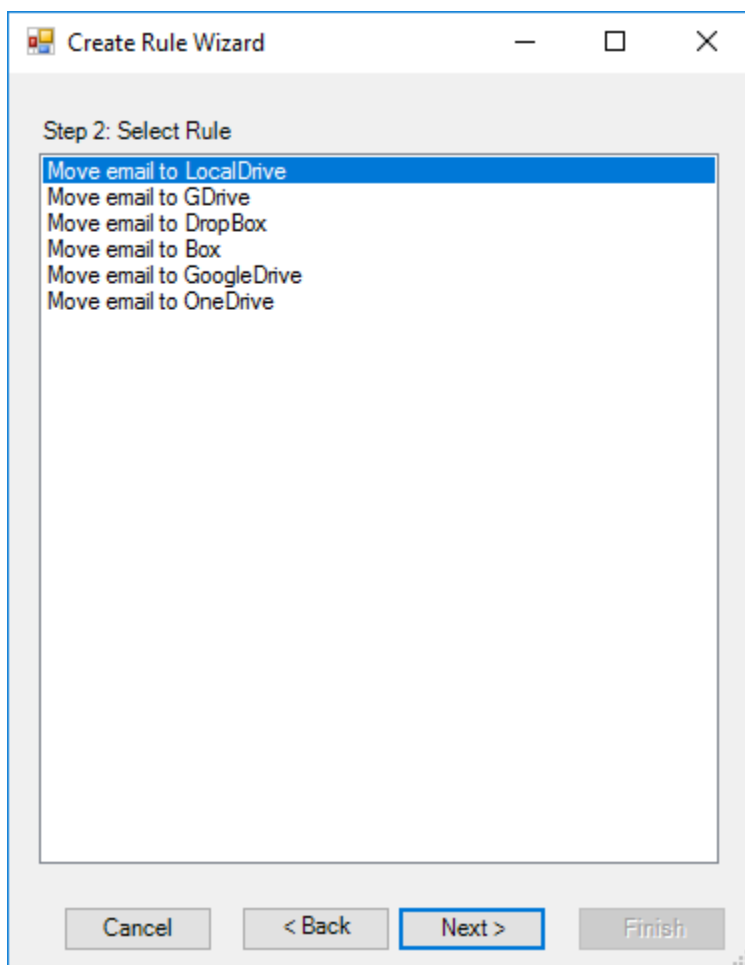
When you click on add rule button you will see a Create Rule Wizard. You will be asked to select rule criteria for email selection. Please check the following image for details:



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## Step 2

You will be asked to select a rule criteria for email storage. Please check the following image for details:

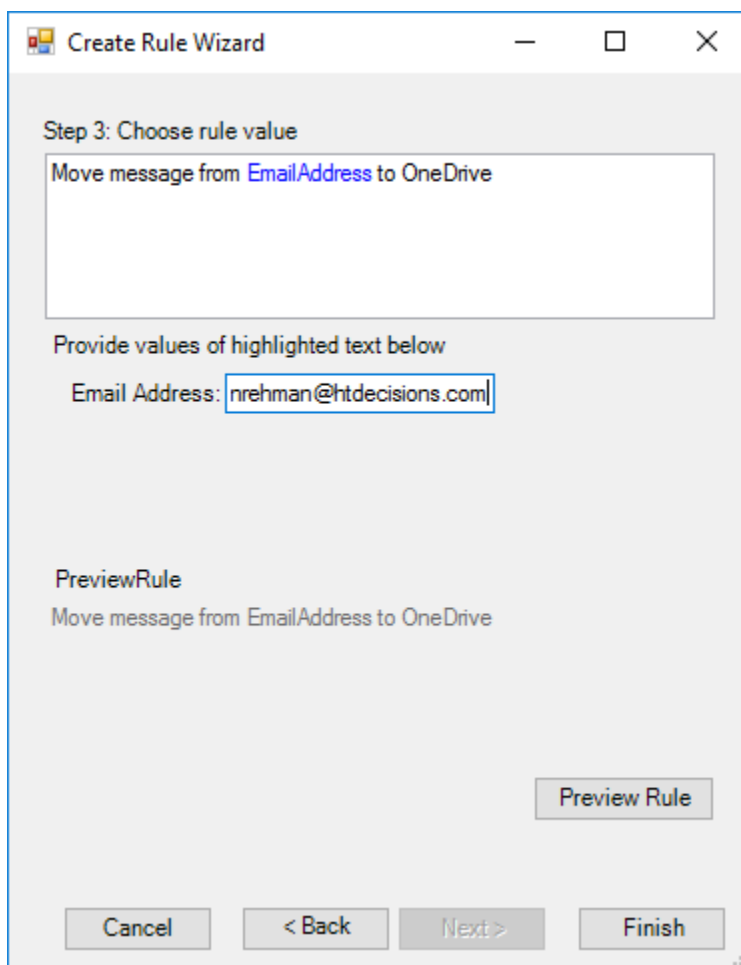




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## Step 3

You will be asked to provide a specific email address on which the rule will be applied.



The screenshot shows a Windows-style dialog box titled "Create Rule Wizard". The window has standard minimize, maximize, and close buttons in the top right corner. The main content area is titled "Step 3: Choose rule value". Inside this area, there is a text box containing the text "Move message from EmailAddress to OneDrive", where "EmailAddress" is highlighted in blue. Below this text box, the instruction "Provide values of highlighted text below" is displayed. Underneath, there is a label "Email Address:" followed by a text input field containing the email address "nrehman@htdecisions.com". Further down, there is a section labeled "PreviewRule" which shows the same text "Move message from EmailAddress to OneDrive". To the right of this preview, there is a button labeled "Preview Rule". At the bottom of the dialog, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

For any further questions please contact: [sjaved@htdecisions.com](mailto:sjaved@htdecisions.com) or [sherazjaved@gmail.com](mailto:sherazjaved@gmail.com)