



# Installation instructions for the Groopit Add-in for Microsoft Outlook

Critical intelligence about competitors, operational issues, sales strategy and other business problems are often lost in email. With the Groopit Add-in for Outlook, users can extract high value insights from email with a single click with Groopit AI. It extracts relevant data points from email to deliver a precise diagnosis of any problem – the root causes, scope, impact, and relative priority. Groopit AI is the AI problem-solving engine that gives leaders the clarity around critical business challenges to transform business results.

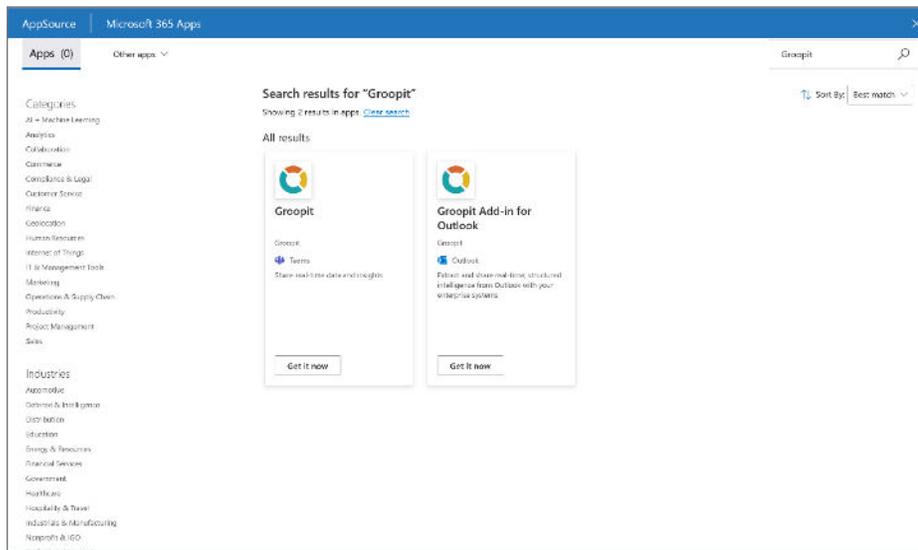
## Integration Requirements

- Microsoft365 administrative privileges to add to the enterprise
- You must be an administrator for the Groopit group you want to integrate.
- Your Groopit email must match your Outlook email. If your does not match, email [help@groopit.co](mailto:help@groopit.co)

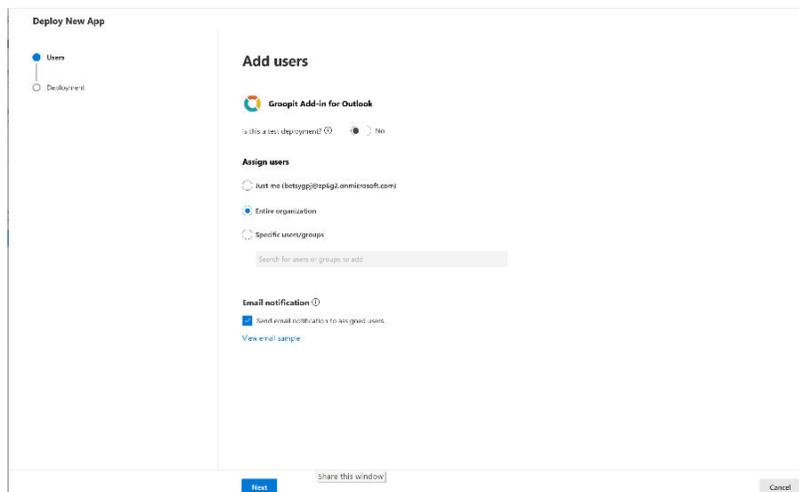
## Enterprise Installation

1. Login into Microsoft 365 admin console with administrative privileges
2. In the left-hand navigation, find Settings. You may have to expand the list using the ... menu.
3. Expand the setting menu and select Integrated Apps
4. From the Integrated apps page, chose Get Apps  Get apps, located underneath the "Popular apps to be deployed" section. It should be the left-most menu item.
5. In the search bar on the upper-right hand side, type Groopit.

- Choose the Groopit Add-in for Outlook. You may see a second app called Groopit, which is the Groopit App for Microsoft Teams.



- Click Get it now
- Click Get it now
- Select for who the Groopit Add-in for Outlook should be installed. You can choose all users (recommended) or specific users and groups.

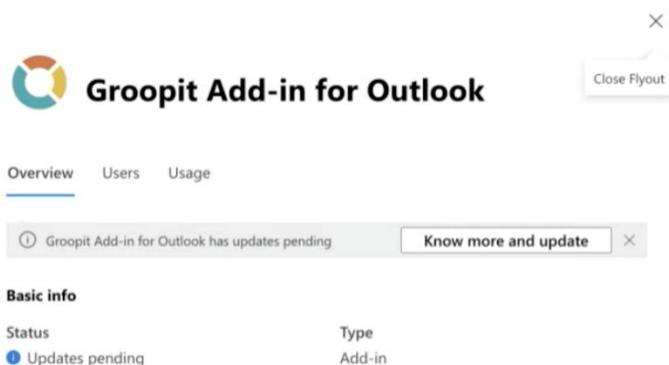


- Click Next
- Click Next
- Finish deployment. It may take up to 24 hours for the Groopit Add in for Outlook to be available to end users. Confirm the availability of the Groopit Add-in for outlook in the ribbon tool bar where other apps are located.

## Enterprise Installation – Add-In Updates

Once the app is installed, most updates will not require any approval or action from administrators. However, for major updates to the add-in, Groopit will notify customers if admin support is needed. In this case, please do the following:

1. Follow steps 1-8 above.
2. You will see a notification that an update is available. Click on “know more and update.”



3. Click “Accept and update”
4. You will receive a notification when the update process is complete.

## Set-up keywords for Outlook

When keywords and a prompt are set, they will prompt the user to share information whenever that keyword is used. So if your keyword is “bananas” and you would like users to be prompted to share competitive intel, you can set up a prompt that appears whenever they mention “bananas” in an email, Teams or Slack. They will be prompted with “You mentioned *bananas*. Do you have *competitive intel* to share?” They simply click the “share” link and the Groopit Add-In will open in the sidebar.

Setting up Keywords is completed in Groopit and you must be a Groopit admin

1. Log-in to Groopit at <https://app.groopit.co>, if you aren’t already.
1. Tap About in the left-hand navigation.
2. Tap Settings in the upper right-hand corner

3. Scroll down to the Keyword Prompts section
4. If you have not configured keyword prompts, you can do so now. Keyword prompts work in Microsoft Teams, Slack and Outlook.
5. Tap Set Keywords and follow the instructions.
6. If you have already set up keyword prompts, you can add them to Outlook. Please note that it may take up to 24 hours for the prompts to appear in Outlook.
7. Specify Active location by tapping the three dotted menu across from Active locations.

**Active Locations**

*Keyword prompts are not active in any locations.*



8. Check box under Outlook

**Active Locations**

*Keyword prompts are not active in any locations.*



**Outlook:**

- Activate keyword prompts for Outlook

*Note: changes to keyword prompts take up to 24 hours to become active.*

9. Click Save. Again, it may take up to 24 hours for the prompts to appear in Outlook

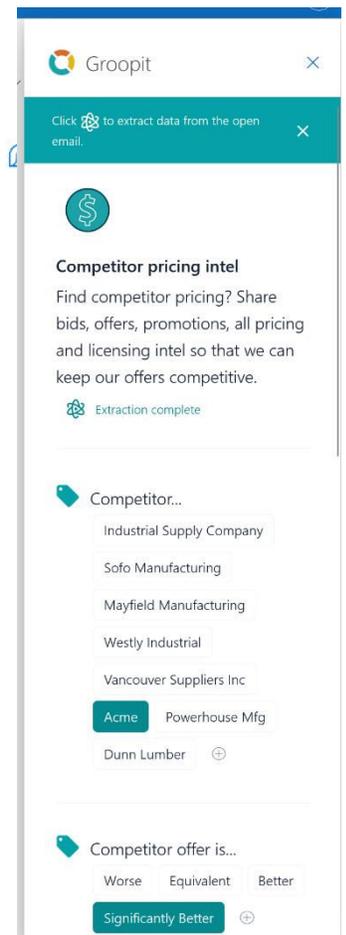
## To use the Groopit Add-in for Outlook

1. Open the email editor by starting a new message or replying to an existing message.
2. For Windows users, tap on the add-in icon in the tool bar.



For Apple Mac users, tap the Groopit link in the tool bar above the compose window

3. Select the Groopit Add-in for Outlook from the drop-down list.
4. The first time you use the Outlook Add-in, you will need to sign-in to connect your Outlook and Groopit accounts. A side-bar will open on the right-hand side of the screen. Tap the green "Sign-In" button in the top right-hand corner of the sidebar.
5. You may see a pop-up that says "Groopit wants to display a new window." Click allow. A new window will open up for you to log-in to Groopit and link your Groopit and Outlook accounts.



6. Enter your Groopit username and password and click sign-in. Your Groopit and Outlook account will be connected, and you can now extract information right from Outlook.
7. Return to the Groopit side-panel and choose the group from the list with the data models where you want to share information.
8. Choose the data model you want to use for extracting data from your email.
9. Click  and the Groopit AI will extract the information from the email and add it to the Groopit data model.
10. Once Groopit AI has completed the extraction, confirm the information is correct, make any additions or adjustments and click Share
11. If you would like to email the information you shared to other people, then click the Add to message button and information from the data model will be added to your email.

## Using Keyword prompts to extract information, enterprise installations only

If your Groopit administrator has set up keyword prompts, a message will appear at the top of your edit window. In this example, a competitor “Mayfield” was mentioned in the email and the user is prompted with “You mentioned Mayfield, do you have competitive intel to share?” Click on the Share button and the Groopit Add-in for Outlook will open on the right-hand side.

