DeltaVision OutlookTextExpress
User Manual

Version 4.2   (Aug. 2022)

Introduction

OutlookTextExpress is an integrated E-Mail solution which allows the use of uniform, prechecked, "boilerplate" text modules to improve productivity and improve customer service relations in a range of applications scaling from small businesses all the way up to international corporations. The use of Outlook-TextExpress in the front end of communications not only prevents tarnishing professional relationships by allowing employees to engage with partners or clients with ad hoc responses which may contain errors or a lack of professionalism, it allows for the use of placeholders in messages which improve productivity and reduce workload, both which are highly valuable commodities.

This document is divided into chapters and indexed according to the Table of Contents below. The first chapters include general instructions for use, the latter chapters detailing diagnostics and support. A glossary is provided at the end of this document. Remember, if you ever have any questions about the use of OutlookTextExpress, please contact us at DeltaVision. We are always happy to help!

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Page 1 / 27
2022-08

Table of Contents

1 General Overview

OutlookTextExpress

OutlookTextExpress is an add-on for Microsoft Outlook that provides the organized use of text modules in multiple languages. The interface to OutlookTextExpress consists of the ribbon tab *TextExpress* along with a task pane called *Text Module Explorer*. The settings pane is accessed via a button on the ribbon and allows for repository configuration, language filtering (depending on license), and other options.

For each text module, you can optionally store mail attachments, the subject of the mail or the recipients of the mail.

Text Module Explorer

The Text Module Explorer is a panel which shows the available text modules in a hierarchical structure called a folder tree. The tree is expanded or collapsed by clicking, revealing a list which may be organized into folders and subfolders. The Search Bar allows for locating specific text modules quickly for use in a new message. Text modules may be renamed, organized in folders, or deleted using the Text Module Explorer.

Placeholders

Placeholders allow users to quickly locate fields within a mail message with dynamic content, i.e. they contain values such as dates, amounts, addresses, numbers, names, or other information that changes from message to message. This allows for quick and through drafting of uniform messages using text modules without searching or accidentally skipping over important information in a message. Placeholders are accessed using the buttons on the *TextExpress* ribbon.
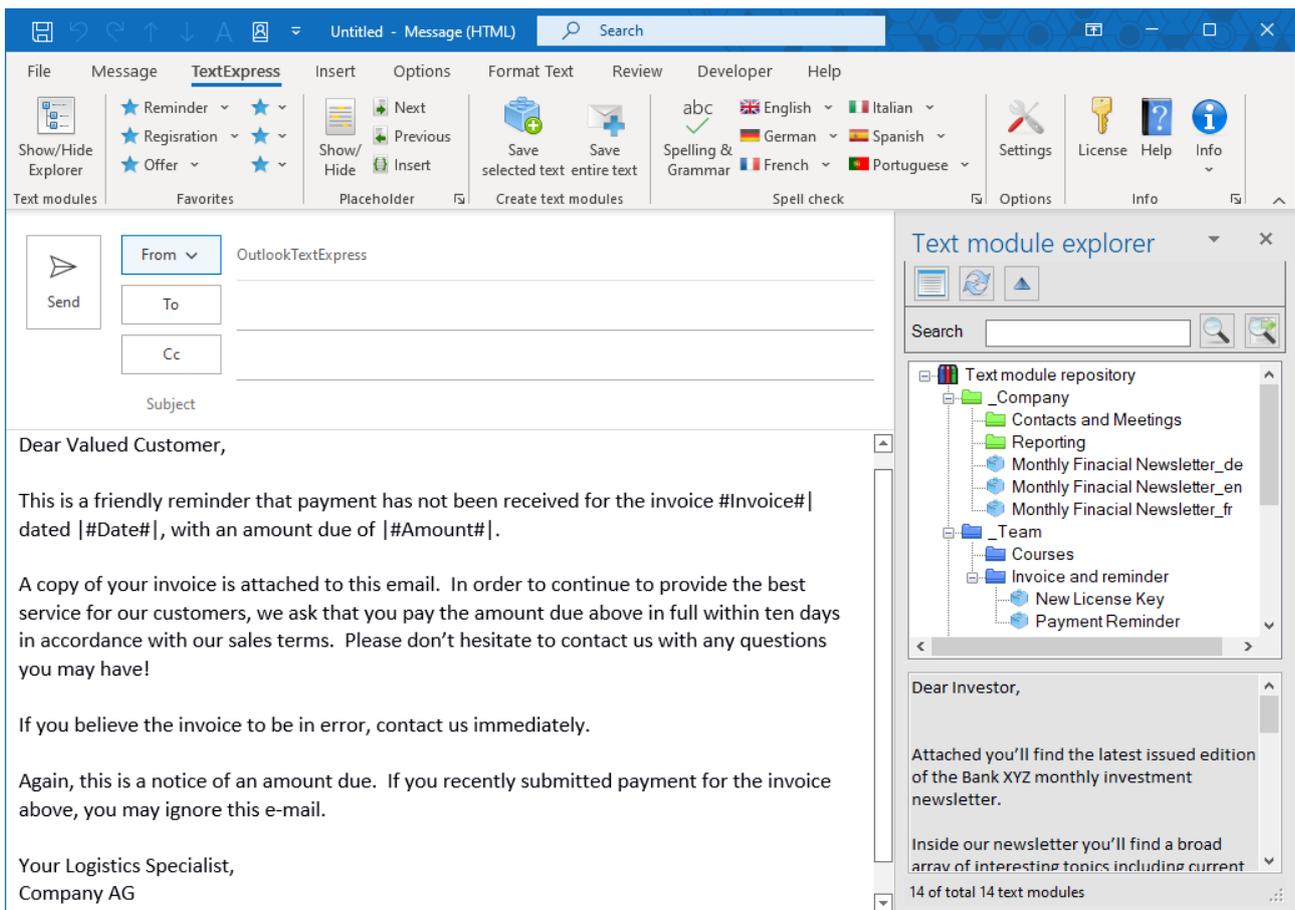
Repositories

The text modules can be stored in up to three different storage paths. In each repository you can organize your text modules in subfolders.

Depending on the license, up to three storage locations (repositories) can be defined.

- *Private Repository*: The private repository is used and administered by the current user.
  (Available in all licenses).
- *Group Repository*: The group repository is used by a group of users and normally located on a network drive. File system permissions are used to control who is only using text modules and who is allowed to change/create text modules.
  (Available only in Professional and Enterprise license).
- *Global Repository*: The global repository is used by an entire firm and operates in the same way as the group repository.
  (Available only in Enterprise license).

Language support:

The *Text Module Explorer* can be used to filter the modules by language; e.g. to show only English or only German text blocks. The language of the text block is kept as part of the filename. This is particularly useful for businesses with international contacts. This multiple language option is only available to users with an enterprise license.

2   Licensing

The following licenses are available according to the specific needs of your organization:

Version	Features
Demo	Enterprise functionality (limited to 30 days).
Basic	Max. 30 text modules with one repository.
Professional	Max. 200 text modules with two repositories.
Enterprise	Unlimited text modules with three repositories, along with language support.

The current registered edition can be viewed by pressing the Info button in the *TextExpress* ribbon.

Demo Mode

When **OutlookTextExpress** is started for the first time after installation, the demo license is automatically configured so that the full functionality can be tested with enterprise functionality for 30 days.

Individualized Setup

For larger companies, we can also provide a customized setup, which, for example, enters the license during the installation.

3 The TextExpress Ribbon

OutlookTextExpress is controlled with the ribbon *TextExpress* which is <u>only visible</u> when creating **new**, **replying,** or **forwarding** existing messages.
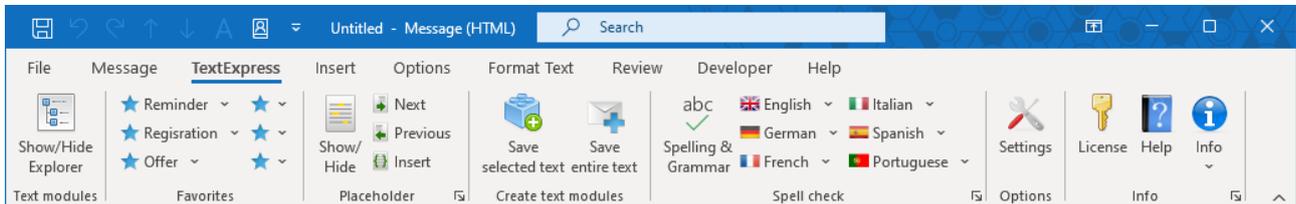
The appearance of this ribbon is dependent on the current selected mode of operation for Outlook.
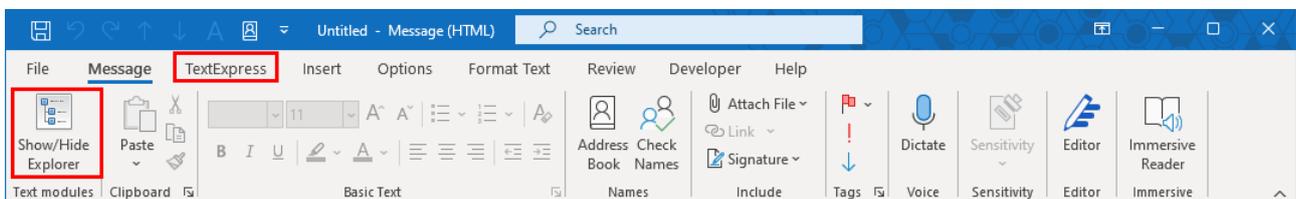

In the tab *Message*, an additional button is present, *Show Hide / Explorer*. This button will show or hide the Text Module Explorer.

According to the Options of Outlook, the actions of **Reply** and **Forward** of a message will not occur in a new window. This has the consequence of making the workspace of the Text Module Explorer invisible. In order to access the text module, the reply or forwarded message must be done in a **new** window.
For this reason, when *OutlookTextExpress* runs for the first time, it automatically enables the Outlook option to always open replies and forwards in a new window to ensure that the add-on is immediately available. If this option is disabled for any reason, you will need to open the message window manually with the following steps,

Variation 1: Undock Message
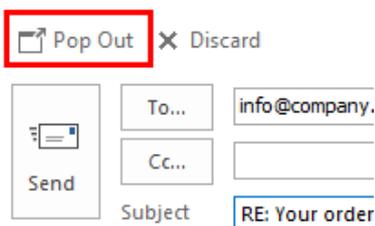
Click on the *Pop Out* Button in the upper-left corner of the Mail window. The message will be opened in a new window and the Text Module Explorer will become visible and accessible via the ribbon of *TextExpress*.

Variation 2: Configuration of Outlook
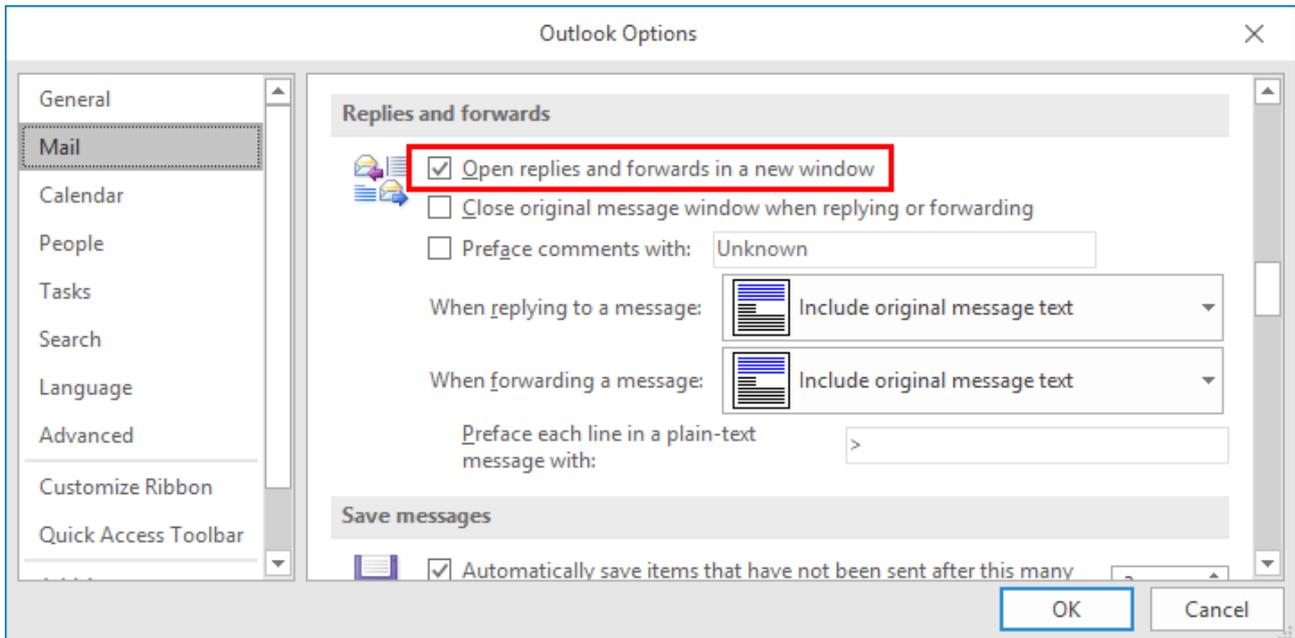
The image above shows how to configure Outlook to open a new window for replies and forwarding of messages. This functionality can be activated under: *File / Options / Mail* in the section *Replies and forwards* and by clicking the box *Open replies and forwards in a new window.*

3.1   The Text Module Explorer

The Text Module Explorer is a task pane located on the right side of the message window. It may be maximized or minimized by selecting the button in the *TextExpress* or *Message* ribbon named: *Show/Hide Explorer*.
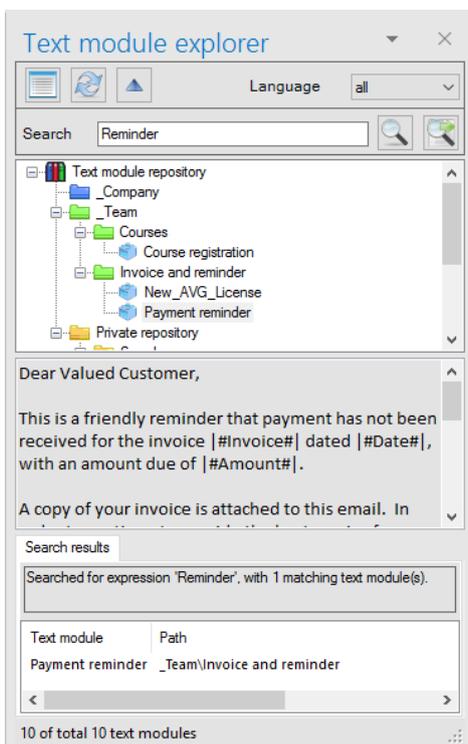
Show/Hide the search results window.

Refreshes the explorer window. The button may be used to reload the contents.

Search for a keyword only in the selected text module. Marks the keyword in the preview pane.

By using this search function, you can look for text modules that contain the keyword you entered. Matching text modules are displayed as a search result list in the explorer.

Click on a text module to get a preview.

A double-click inserts the text module at the current cursor position in the e-mail.

You can find additional commands in the context menu (right click) of the various panels.

Remarks: The panel high for the preview- and search result panel can be adjusted.

3.2 Configuring the Text Module Explorer Folder Tree

Depending on the license, up to three text module repositories may be configured. All licenses include the "*Private Repository*" which may be located at any path. By default, the private repository path is configured at this location*:

`C:\Users\`*John*`\AppData\Roaming\DeltaVision\OutlookTextExpress\Private Repository`
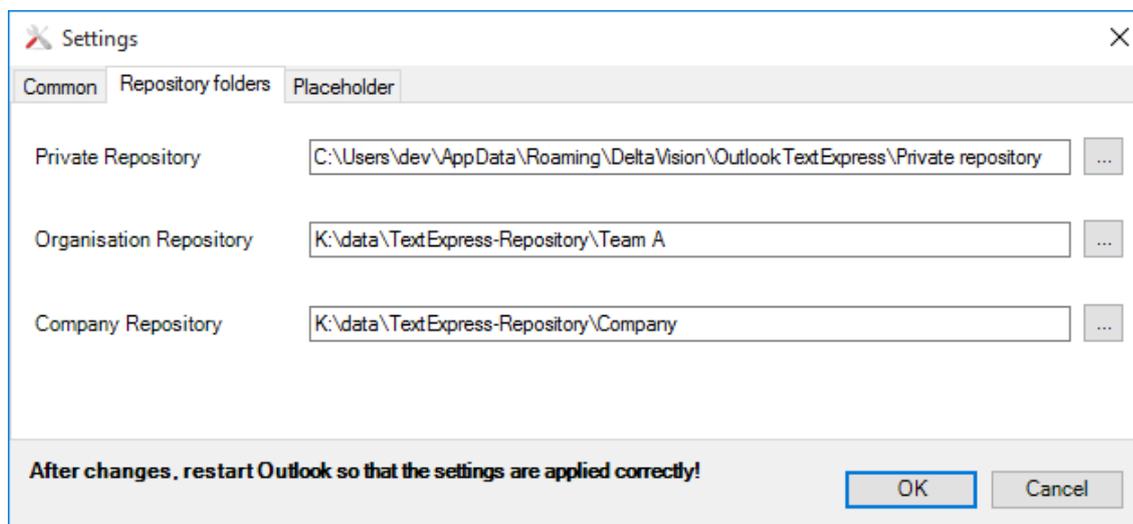
* *John* is the username of the currently logged-in user.

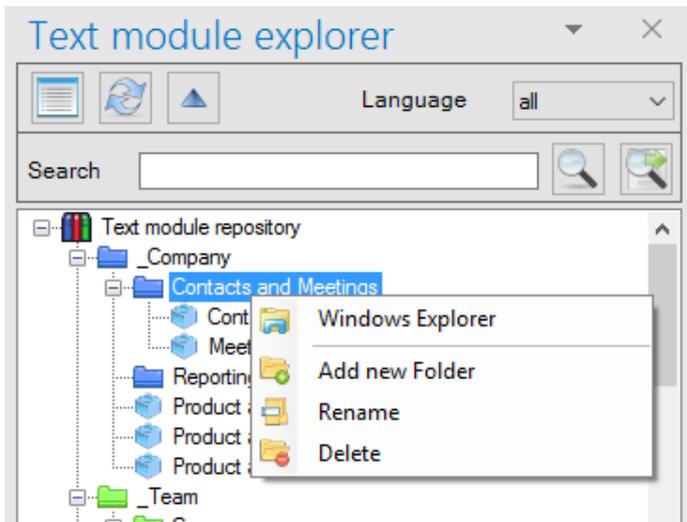**The idea behind different repositories:**

- In the *Private Repository*, users can save their own, personal text modules.
- In the *Group Repository*, text modules can be uniformly administered for an entire group. This is useful for a certain organization within a company. In this repository, individual users may be configured to have read access only.
- In the *Global Repository*, additional text modules can be saved which should be used uniformly within an entire organization. As in the group folder, individual users can be configured to have read access only for text modules in this group.

In the tab *Repository folders*, the three repository paths may be entered or changed. If no entry is made for the private repository path, the standard path will be used (see above)

Tip: The basic edition only allows for the use of one repository. For additional repository functionality one may purchase an upgraded license from DeltaVision. See the licensing section for more information.

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Page 7 / 27
2022-08

## 3.3 Creating a Subfolder / Renaming Folders / Deleting Folders

The folders which organize the text modules can be managed using the OutlookTextExpress folder tree. Using the folder tree, users may create new folders, rename folders, or delete folders. What can be done using the OutlookTextExpress folder tree or may also be accomplished using Windows Explorer.

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Page 8 / 27
2022-08

4 Using Text Modules

With a Double-Click

Double-clicking on the desired text module in the Text Module Explorer will automatically insert it at the current cursor position on the active message window.
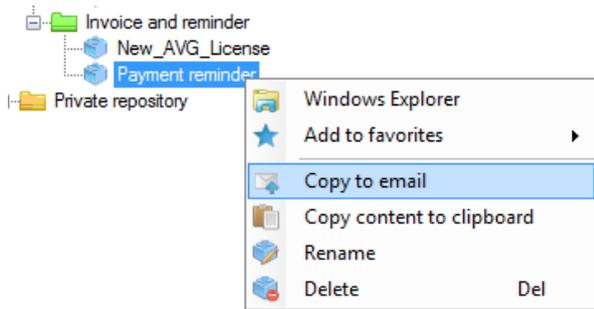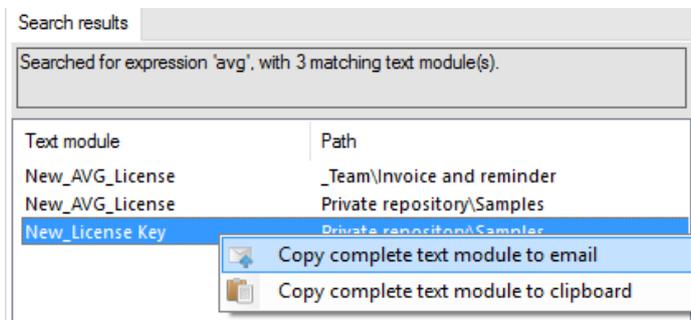

Using the context menu (right-click):

A text module can also be used via right click in the folder tree and selecting *Copy to email.*

4.1 Using only a Section of a Text Module
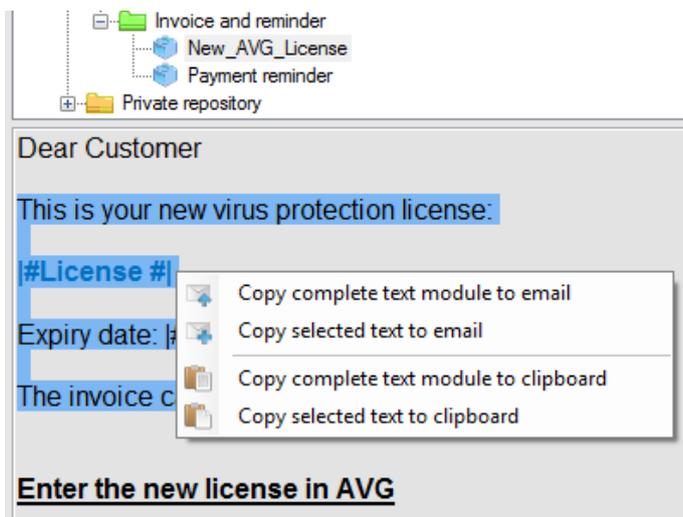
To copy only a part of a text module, select the desired section in the preview area and then choose the corresponding command in the context menu

4.2 Using a Text Module via the Search Tool

Once a specific text module has been located with a search, it can be used directly inside of a message. This can be done easily by double-clicking on the found text module. The context menu (right-click) can be used to copy the text module text to the clipboard or email.

Note: The maximum number of text modules which are shown in the Text Module Explorer are limited depending on the current license.

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Page 9 / 27
2022-08

5 Finding Text Modules

To find specific text modules in a given language, either the language filter may be used to limit the shown matches or the search tool may be used to find results with desired content. Note that when the search tool is used, the filenames themselves will also be scanned for the pattern.

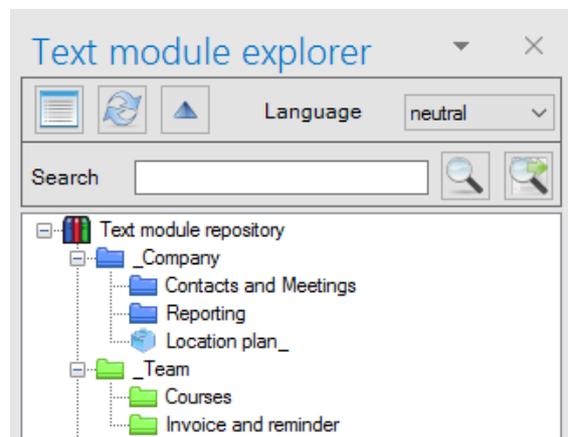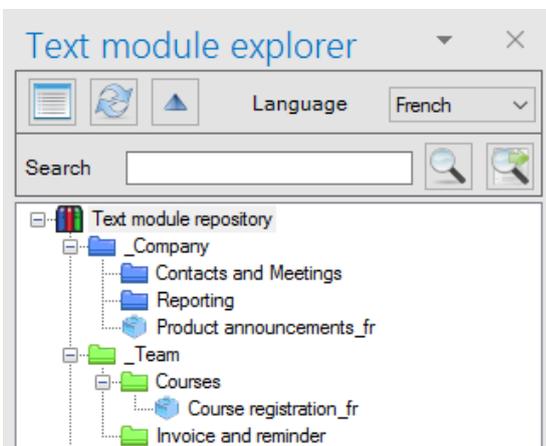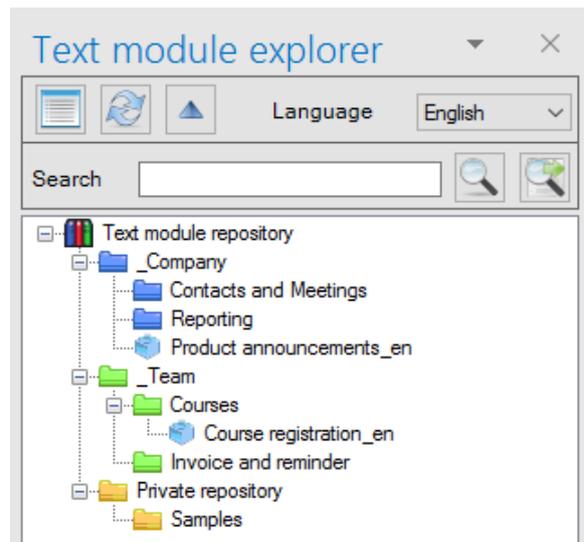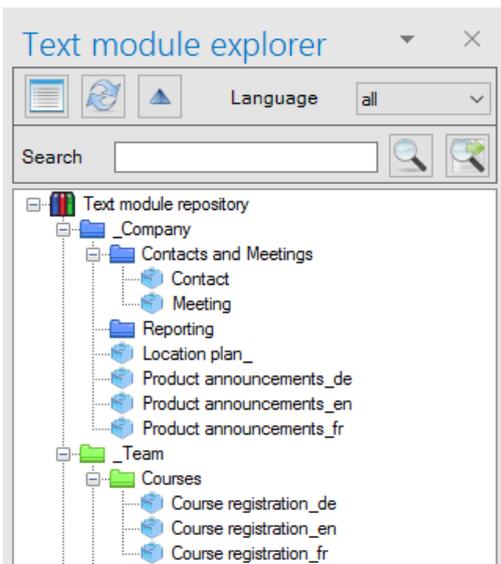## 5.1 Language Filter (Enterprise Version Only)

The Text Module Explorer can filter modules by language. To select a specific language, use the drop-down menu in the ribbon of the Text Module Explorer. This feature is only available if it has been enabled in the settings and with an enterprise license.
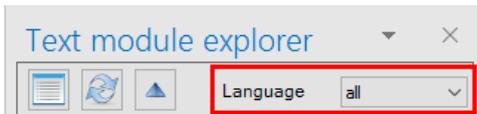
When *all* is selected, all available text modules will be shown.

For example, when *German* is selected for the language filter, only text modules with the language designator '_de' are shown. If *neutral* is selected, the associated text modules will be shown having the empty language designation '_'

The following illustrations show how the language filter displays text modules in the desired language.

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Page 10 / 27
2022-08

5.2   Searching for Text

Specific text modules may be found using the search tool within the Text Module Explorer.

Enter the desired search term in the field and then press either of the two search buttons on the right side.

Search will be performed in the currently selected text module only. The results will be highlighted in yellow in the viewing window (see illustration A).
Keyboard shortcut: *Enter*

Search will be performed in all available text modules. The results will be given in the search result list (see illustration B).
Keyboard shortcut: *Ctrl-Enter*

Illustration A

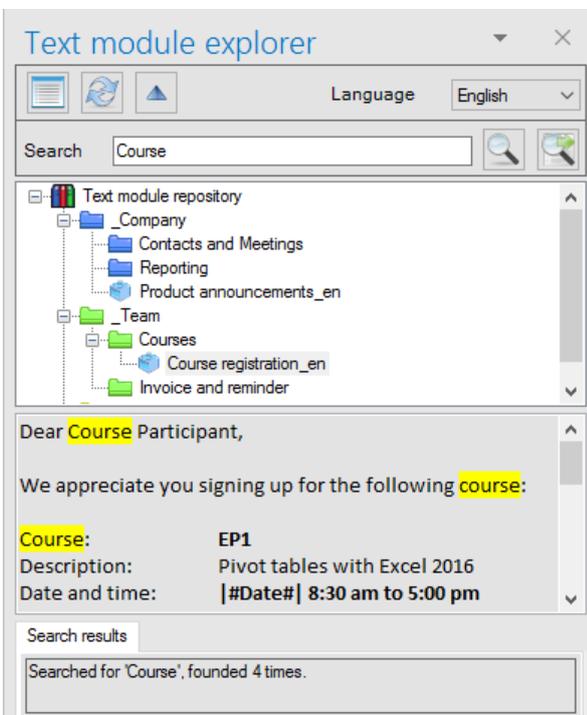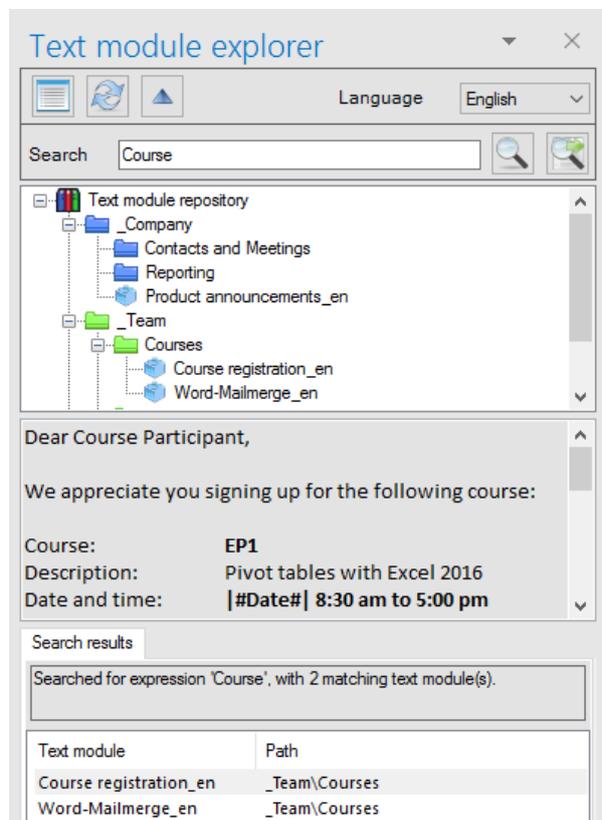Illustration B

Remark: *If the text module contains hyperlinks, it is possible that the search results will not be completely correctly highlighted. This is because the search tool also searches through the address information hidden in the hyperlink which cannot be displayed.*

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Page 11 / 27
2022-08

6   Creating a text module

Select the desired text in the mail which should be saved. Then press the button *Save selected text* in the TextExpress tab.

With the button *Save entire text*, the entire text may be saved and used as a new text module.

As long as the maximum number of text modules is not exceeded according to the current license, the selected text can be saved to a new text module.
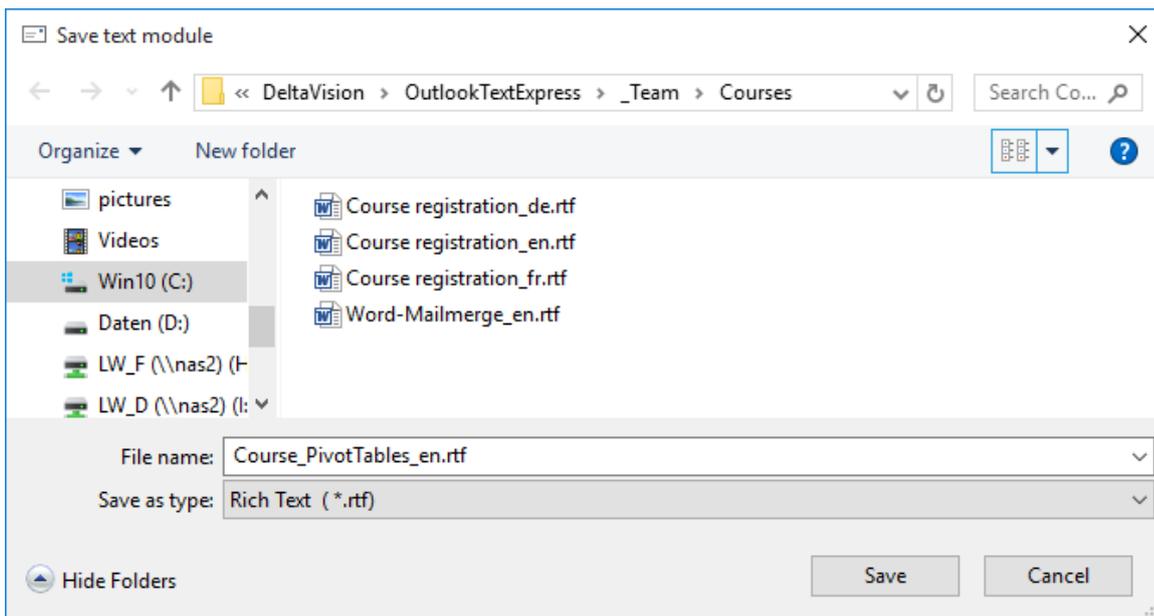
If the current license allows language filter support (enterprise only), and this functionality is enabled, then the *Language Support* dialog is displayed where the language of the new text module can be set.
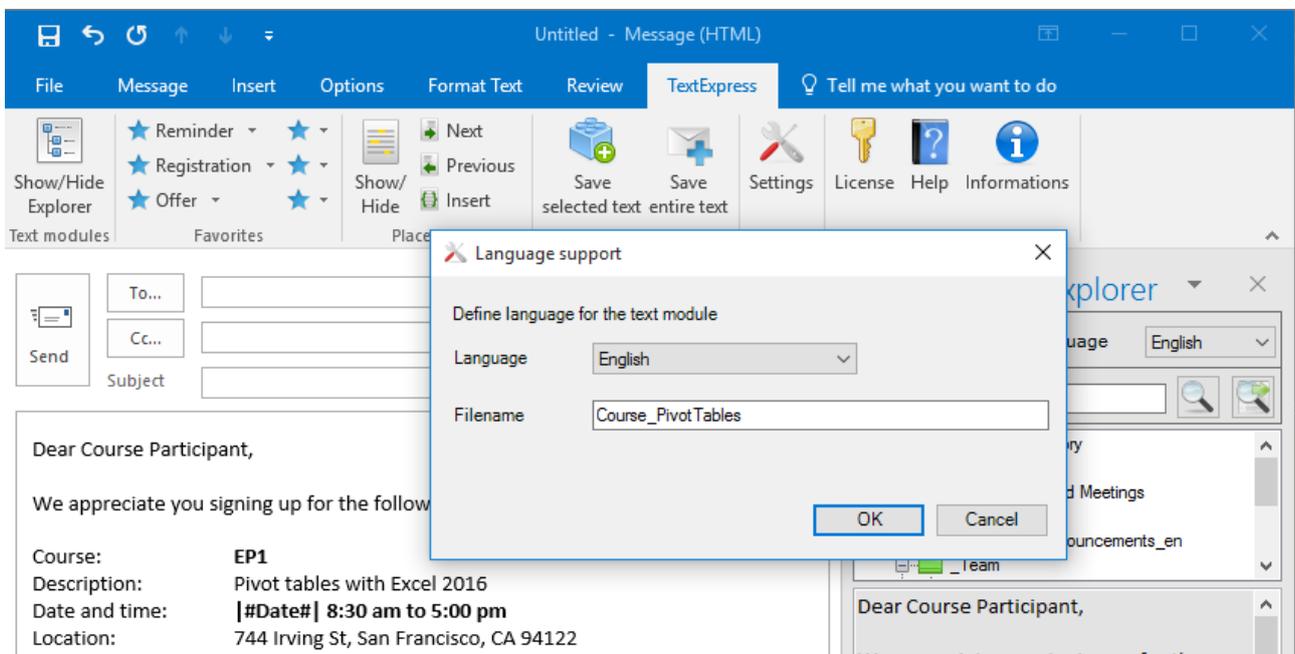
Choose the correct language of the new text module (e.g., for the creation of a new German text module select German). Alternatively, *neutral* may also be selected if the language of the new text modules is not important.

Finally, enter an appropriate name. The combination of the name and the language designator (see above) form the complete filename of the text module.

After pressing the OK button, the *Save text module* dialog appears. This is the case with no active language filter support as well.

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Page 12 / 27
2022-08

Important for Language Filter Support:

The ending (e.g. ''_de'') should not be deleted! Without this suffix, the language of the text module cannot be recognized.

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Page 13 / 27
2022-08

6.1   Language Filter Support (Enterprise Version Only)
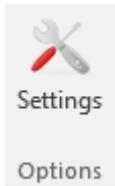
The *Settings* button opens the program settings.
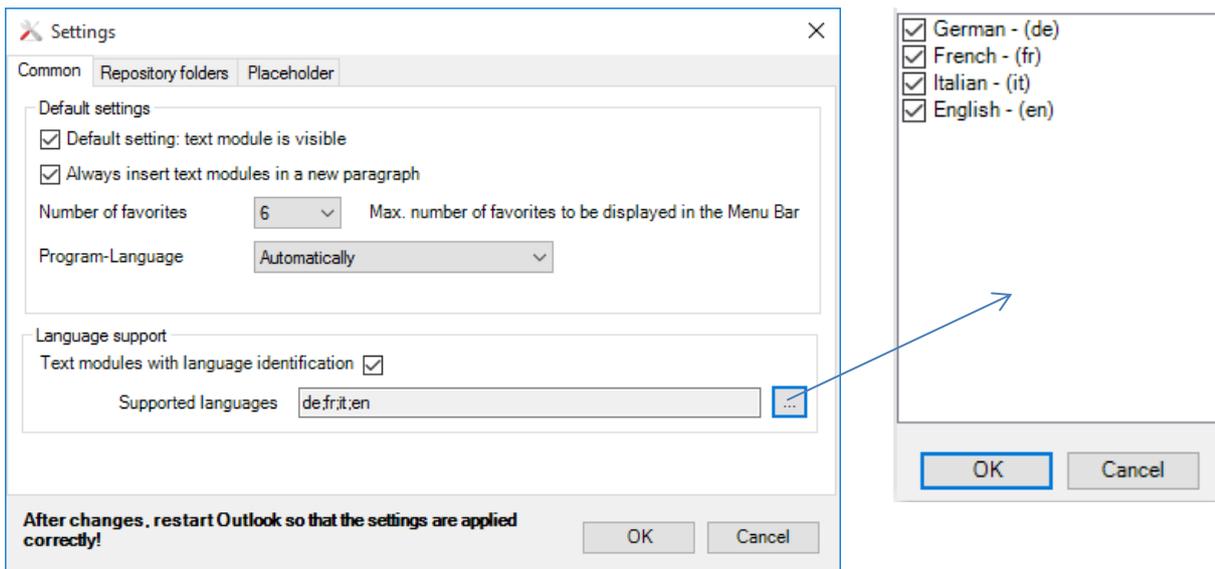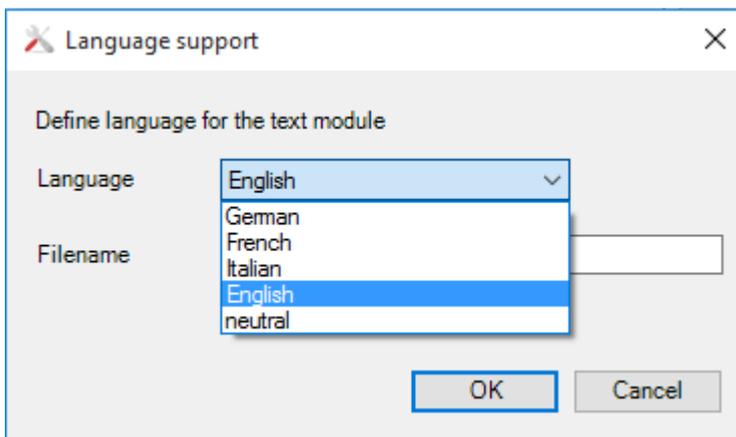
Activate the checkbox *Text Modules with Language identification* to enable text modules with different languages.

Support for languages which are not listed may also be possible. Please contact DeltaVision for further information.

With enabled language support the following dialog appears when a text module is saved:

The language selection drop-down menu contains the languages as well as the *neutral* selection.

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Page 14 / 27
2022-08

7   Expanding Text Module functionality

For each text module an action file can be created in which you can defined what kind of actions the program should perform when the text module is added to the e-mail.

The following three types of actions can be defined:

a)   Attach one or more files to the e-mail
b)   Fill in the subject of the e-mail
c)   Add e-mail recipient

Examples:

1)   When inserting a text module with a route description, a PDF-map is automatically attached.
2)   If a text module containing promotional material or special offers than you can define, that the appropriate price list is automatically attached.
3)   A text module containing the terms & conditions can attach a PDF version at the same time.

To add actions to a text module, you only need a text file with the same name as the text module and the extension ".`ini`". The action file is stored in the same folder as the text module. This procedure is easily done with the integrated wizard, see the following description.
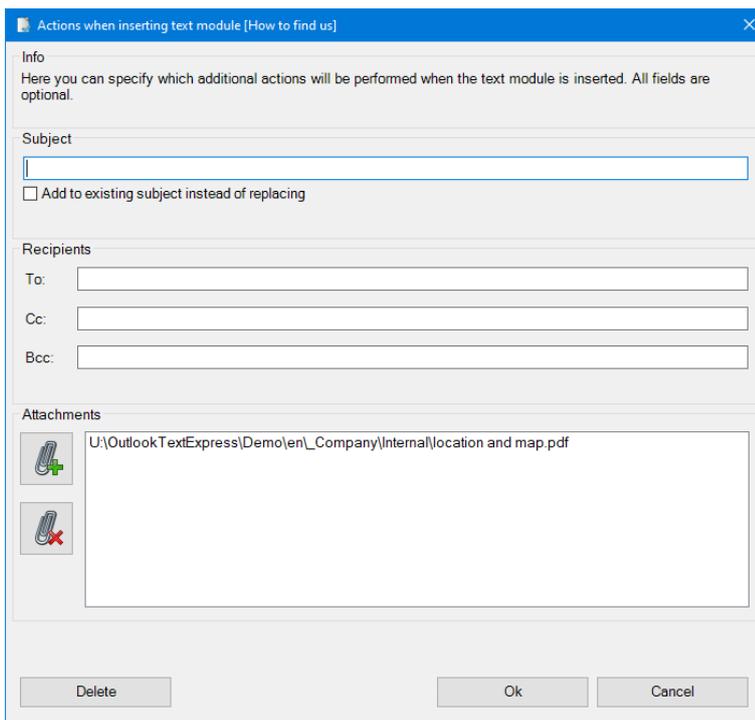
Example:

To define actions for the text module *how_to_find_us.rft* simply create the text file *how_to_find_us.ini*.

7.1   Action File configuration
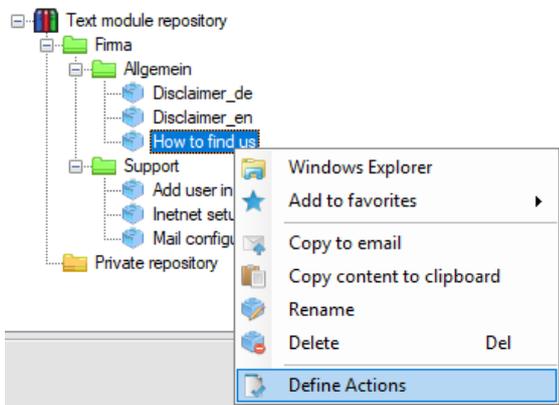
The easiest way to create the action file is to use the context menu of the text module. If the file does not exist yet, it will be created automatically. Afterwards the assistant opens.

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+41 43 255 97 01
www.outlooktextexpress.com

Page 15 / 27
2022-08

Define the desired actions. In our example we want to attach the file `location and map.pdf` to the e-mail

Multiple recipients can be separated with semicolon.

The settings can be changed again at any time.

With *Delete* all defined actions are deleted. (The action file *.ini is deleted).

In the repository the files can look like this:

Only for the text module "How to find us" an action file was created.

7.2   Technical information about the action file

This information is intended for system administrators only.

7.2.1   Structure of the action file

The action file is a simple text file known in IT as Inifile. It is divided into the following three sections.
All sections and all keys are optional.

If you want one or more files to be automatically attached to the e-mail when inserting a text module, you can list the desired files here. The key name must be numbered sequentially, starting with File1.

```
[Attachments]
File1 = u:\common\how_to_find_us.pdf
File2 = u:\common\pictures\map.jpg
File3 = \\server\share\2019\pricelist.xlsx
```

If the subject line is also to be filled in, the text can be stored here. If several text modules have defined an action and set the subject, the module which is inserted last wins. Optionally the parameter *Append* can be set to *true*, then the text is added to the existing subject. If Append is not specified, the subject is always replaced.

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Page 16 / 27
2022-08

```
[Subject]
Text = Your text in the subject line
Append = false
```

Mail recipients can be set automatically. You can choose if the recipient should be *TO*, *CC* or *BCC*. Several mail addresses are separated by a semicolon.

```
[Recipients]
TO = info@company.com
CC = office@adventrue.com; info@hotmail.com
BCC =
```
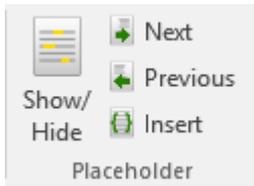
If you want to delete **all** actions for a text module, simply delete the action file (*.ini).

Note: Make sure that the configuration file does not contain any errors. Section names and key names must be correct. Upper/lower case is not important. The sequence of the sections or key names can be chosen arbitrarily. If the file has formal errors none of the actions will be executed.

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Page 17 / 27
2022-08

8   Working with placeholders

Placeholders allow for marking fields in text modules which should be changed with each message. These fields can be *names*, *dates*, *tracking numbers*, *order notes*, *hyperlinks*, or other values which change from message to message. Placeholders make it easy to keep track of where these fields are in a text module, and the integration with the buttons on the TextExpress ribbon make it quick and easy to skip from one placeholder to the next, without forgetting!

A placeholder in OutlookTextExpress is always signified by |# #|.

Example:

The text module 'Payment Reminder' contains the following lines:

This is a friendly reminder that payment has not been received for the invoice |#Invoice#| dated |#Date#|, with an amount due of |#Amount#|.

This text will be inserted directly (1:1) into the currently opened mail.

8.1   Creating a Text Module with Placeholder

Write a new mail or use an existing one which contains text and click on the Reply button so that a newly editable mail message window is created.

1.   Locate the cursor in the desired position in the mail to mark the position of the new placeholder
2.   Select *Insert* from the *Placeholder* group on the *TextExpress* ribbon. A new placeholder will be inserted at the cursor position with the markers (**|# #|**). Example: for the invoice |# #|
3.   Enter a name for the new placeholder. The placeholder then appears as follows:
Example: for the invoice |#Invoice#|
4.   Repeat this procedure for every new placeholder.
5.   Select the entire completed text with placeholders and save the selection as a new text module.

8.2   Locating Placeholders in a New Mail

Create a new mail with the desired text module and placeholders. To see every placeholder in the mail, click on the button *Show / Hide*. Now, all placeholder instances are visible and highlighted with a background color. Press this button again to remove the highlighting.

This is a friendly reminder that payment has not been received for the invoice |#Invoice#| dated |#Date#|, with an amount due of |#Amount#|.

8.3   Switching to a Placeholder

To replace the placeholders, they may be highlighted entirely by OutlookTextExpress. To do this, press the *Next* or *Previous* button in the OutlookTextExpress ribbon to move from one placeholder to the next and overwrite them as necessary.

This is a friendly reminder that payment has not been received for the invoice |#Invoice#| dated |#Date#|, with an amount due of |#Amount#|.

Jump to placeholder position in text.

This is a friendly reminder that payment has not been received for the invoice 12345 dated |#Date#|, with an amount due of |#Amount#|.

... and enter the desired information.

9 Checking before sending a mail
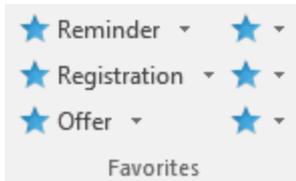
9.1 Check if all placeholders are filled in

When using text modules with placeholders, it can happen that you forget to replace the placeholders with meaningful values such as the invoice number or a delivery date and send the mail "incomplete", which is of course not ideal. To avoid this, activate the corresponding checkbox under the settings so that the mail dispatch is canceled in this case.
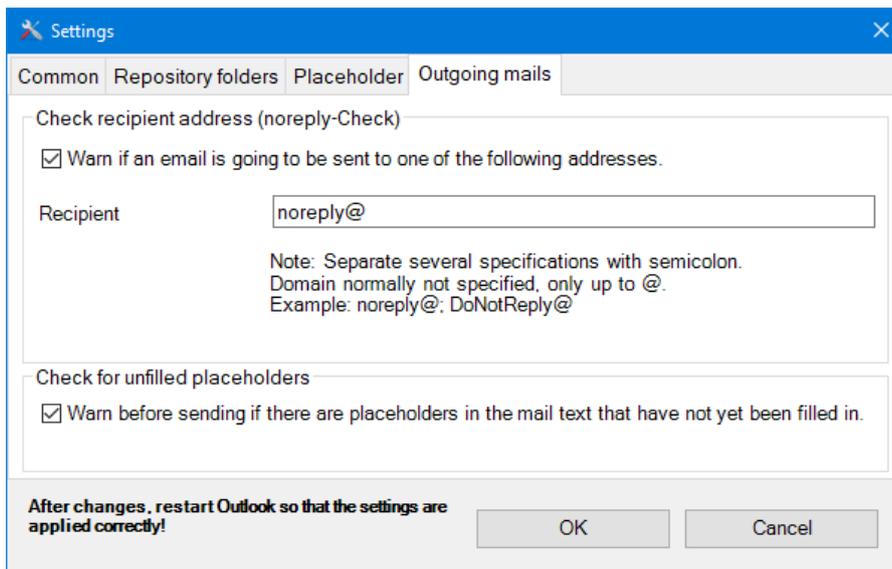

9.2 Noreply mail address

It can easily happen that you reply to a mail that was automatically generated by a system and belongs to an unmonitored mail account. Often such a sender address is noreply@companyXY.com. If you activate the checkbox here, a corresponding message will be displayed when sending the reply, which will draw your attention to the "mistake".

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Page 19 / 27
2022-08
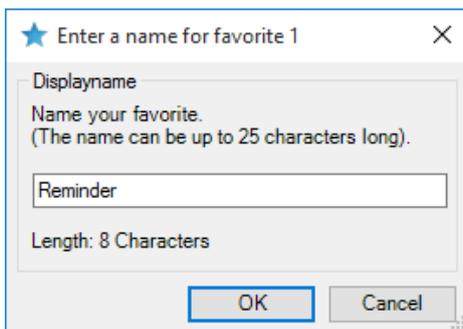
10 Working with favorites

Up to nine most frequently used text modules may be saved as favorites.

Note: Using the *settings* panel, preferences may be configured to have 0, 3, 6, or 9 favorites in the OutlookTextExpress ribbon.
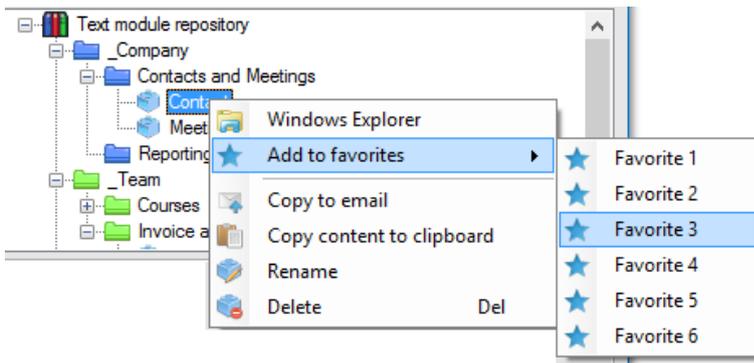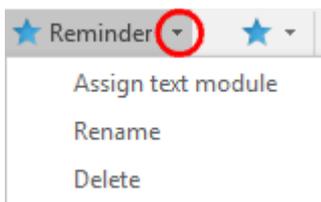
To save a specific text module as a favorite, select the desired module and choose *Add to Favorites* from the context menu (right click).

Enter a name for the new favorite and confirm the entry with OK.

The favorite will now appear as a link to the desired text module.

In the case that the favorite is already occupied, the old favorite will be replaced.
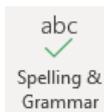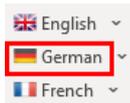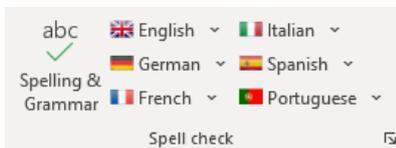
As an alternative, the drop-down menu in the ribbon can be used to assign a specific text module to the favorites. Just select *Assign Text Module* to assign the text module file from the file system to the favorites. This has the same result as the procedure noted above.

In addition, using the drop-down menu, the favorite may be deleted or renamed using the same procedure.

➔ **Click on a favorite to load the selected text module in a new mail.**

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Page 20 / 27
2022-08

11 Set language of mail text

This function is only available in the Enterprise version.

If you write mails in different languages and want to check the spelling, the text must be provided with the correct language identifier. With the help of TextExpress, the desired language can be assigned to the selected text with just one click. The language of each of the 6 buttons can be assigned individually.
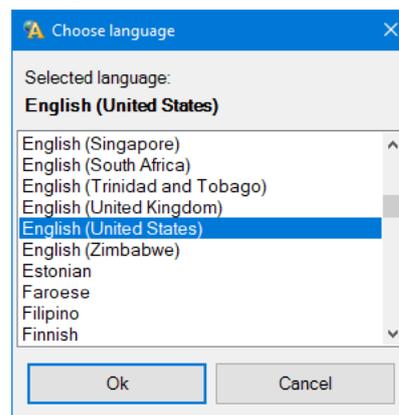
Assign language for the spell checker
Select the text and click on the desired button, e.g. German.
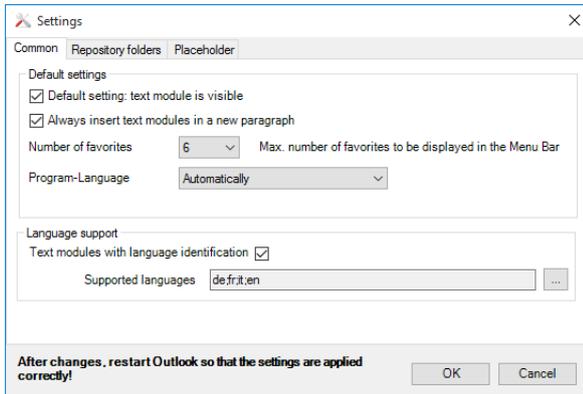
Starts the integrated spell checker of Outlook

Change language of button
Select Language command and make the desired selection in the dialog.

Under the *Settings*, *Common* tab, you can define how many (0..6) language buttons are available in the ribbon.

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Page 21 / 27
2022-08

12 Settings

Using the Text Module Explorer in the standard view, it may be configured to be opened with each new mail. The explorer may also be opened or minimized at any time using the button *Show / Hide Explorer* from the ribbon

With the selection *Always insert text modules in a new paragraph*, OutlookTextExpress may be configured to always insert text modules in a new paragraph automatically.

The section *Language Support* is only available in the *enterprise* version. It can be used to define the desired languages and to switch the language support on / off.
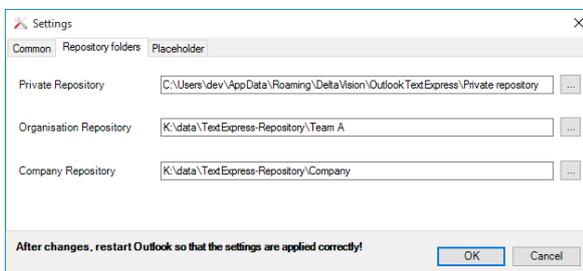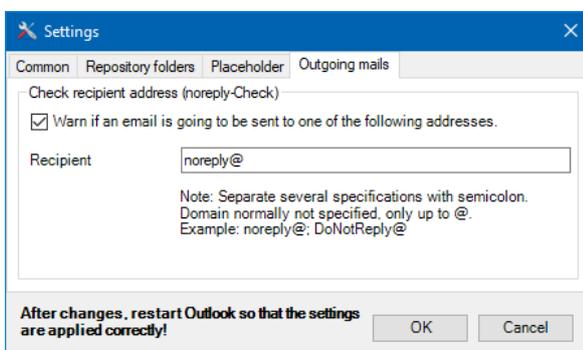
In this tab each repository folder path should be configured.

Tip: The basic edition only allows for the use of one folder. For additional folder functionality an upgraded license may be purchased from DeltaVision.
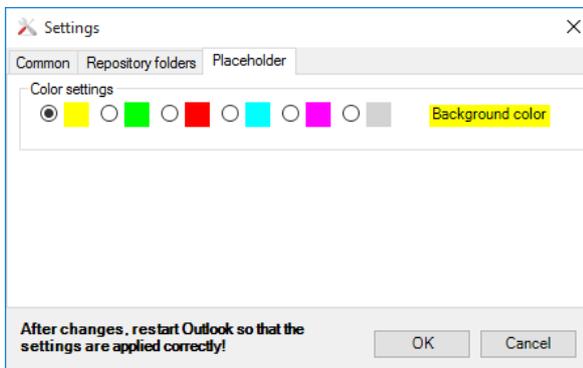
In this tab the background color of the highlighting for the placeholders may be configured.

It quickly happens that you reply to a mail that was automatically generated by a system and belongs to an unmonitored mail account. Often such a sender address is **noreply**@company.com

If you activate the checkbox here, a corresponding message will be displayed when replying (sending the reply), which will draw your attention to the "error".

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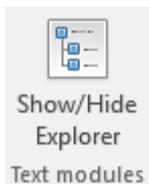www.outlooktextexpress.com

Page 22 / 27
2022-08

13 Licensing

Pressing the button *License* in the TextExpress tab shows current license information. A new license number may also be entered. Please note that the License Number **AND** also both lines of the *Licensed To*: must be entered exactly into all three fields before the license is accepted.

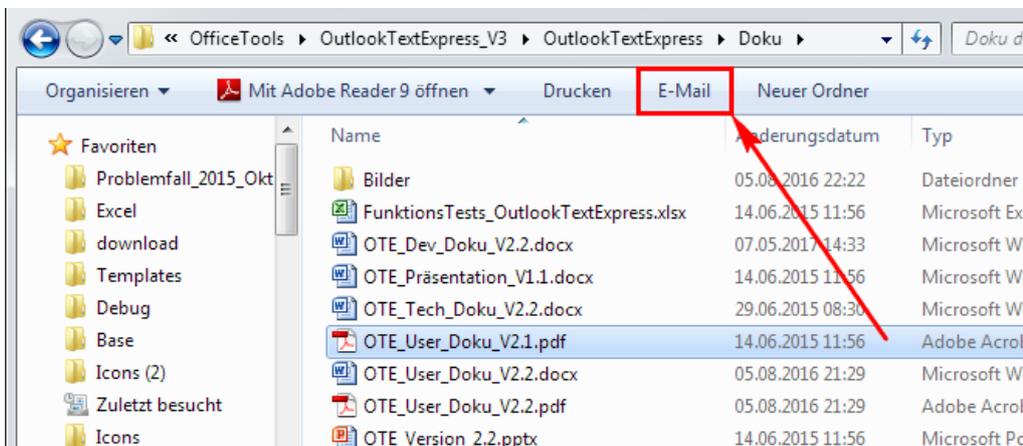In the *Info* dialog, the current type of license may be viewed (*Basic*, *Professional*, *Enterprise*)

14 Help / Support / Crash Reporting

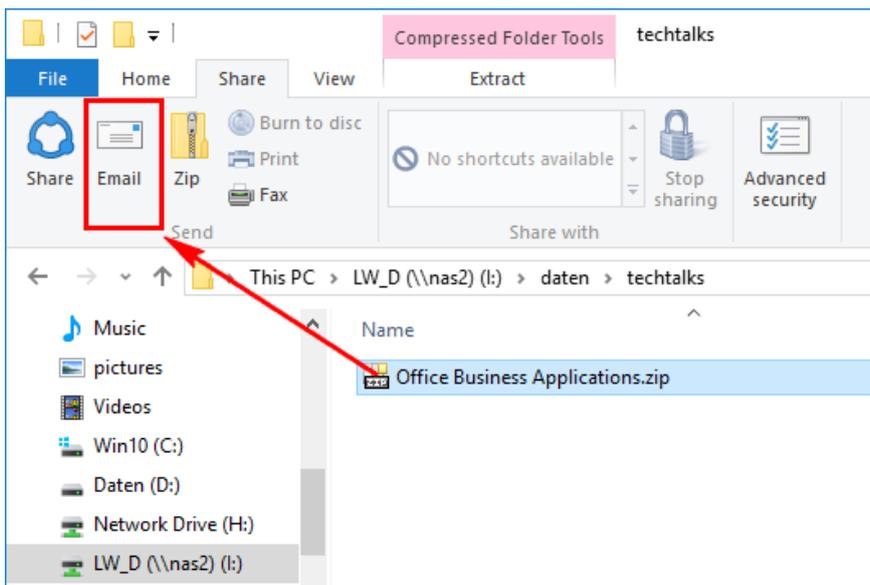## 14.1 New Mail does not open OutlookTextExpress

The **Text Module Explorer** is not shown when creating a new mail using Windows Explorer (for example when selecting a file on the desktop and creating a new mail via this method). This is because OutlookTextExpress is not activated via this method. However, the *Text Module Explorer* can always be accessed by using the *Show/Hide Explorer* button on the left side of the TextExpress ribbon to access the desired text module.

The same behavior will result when selecting a file and using the context menu and selecting the command *Send to / Mail recipient.* In this case the *Text Module Explorer* panel will not be visible and must be activated manually.

Windows 7 Explorer

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Page 23 / 27
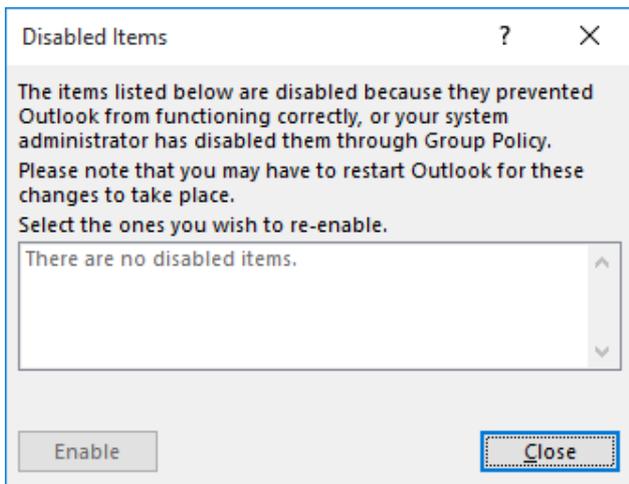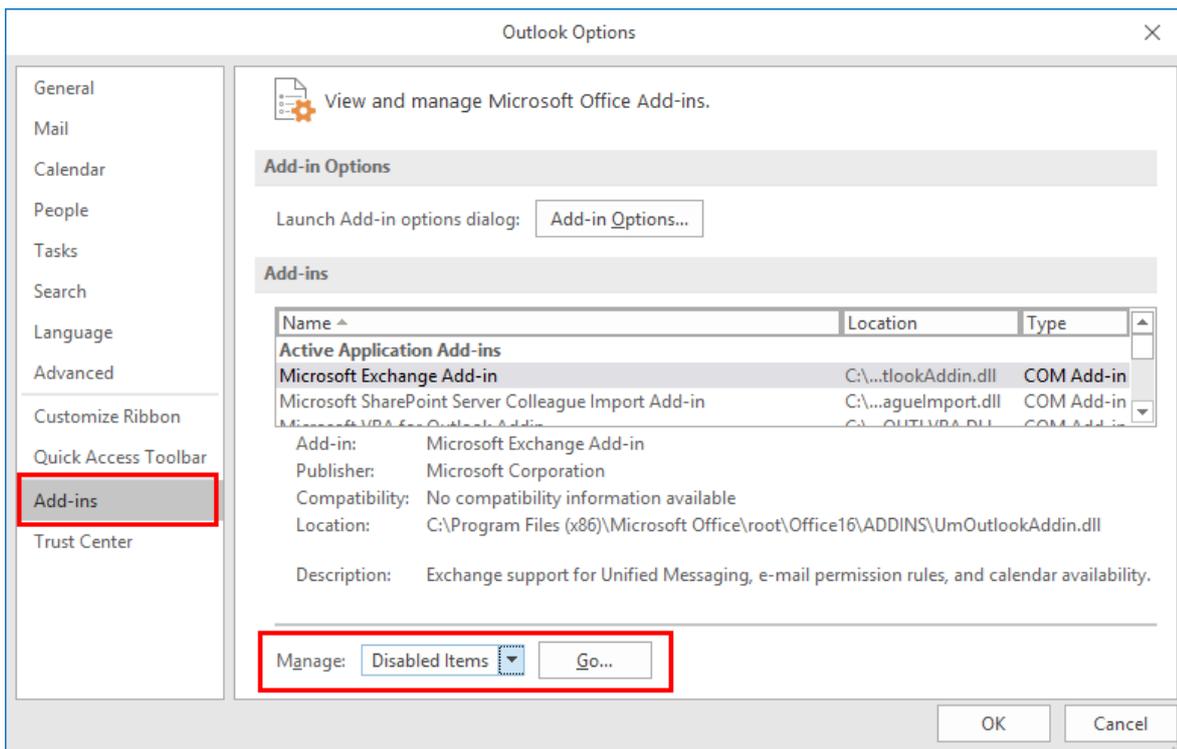2022-08

14.2   Problem: Add-in was Disabled

In the case that an error occurs while loading an Add-in module during the start of Outlook, the Add-in may be deactivated. If an Add-in causes loading delays the same thing occurs.

In the case that the Add-in is not loaded, the individual elements which have been deactivated must be checked. Further, the starting routines may be checked by viewing the COM-Add-ins. In Outlook 2013 and above the specific Add-In which was deactivated may be checked by viewing the information from Outlook which is available when the Add-in is loaded too slowly.

14.3   Disabled Items

The list of disabled items may be viewed using the list illustrated below:

In Outlook go to *File / Options* and choose *Add-ins*. Choose on the right side *Disabled Items*. Click on the button *Go.*

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Page 24 / 27
2022-08

If the dialog illustrated on the left appears, and *OutlookTextExpress* is listed, select and click *Enable.*

Finally, close the dialog and a restart Outlook.

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Page 25 / 27
2022-08

14.4 COM Add-Ins

If the add-in on the next start of Outlook is not loaded, then check under *File / Options / Add-Ins*, if the *COM-Add-ins* for *OutlookTextExpress* is activated.
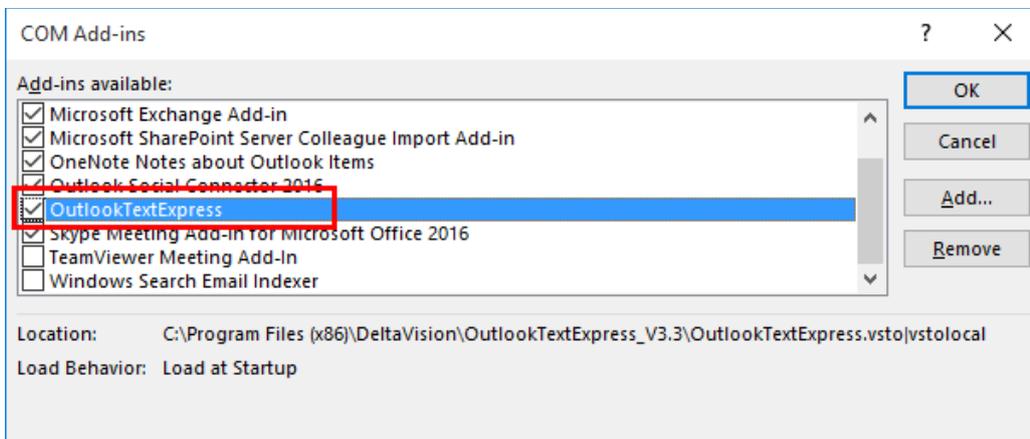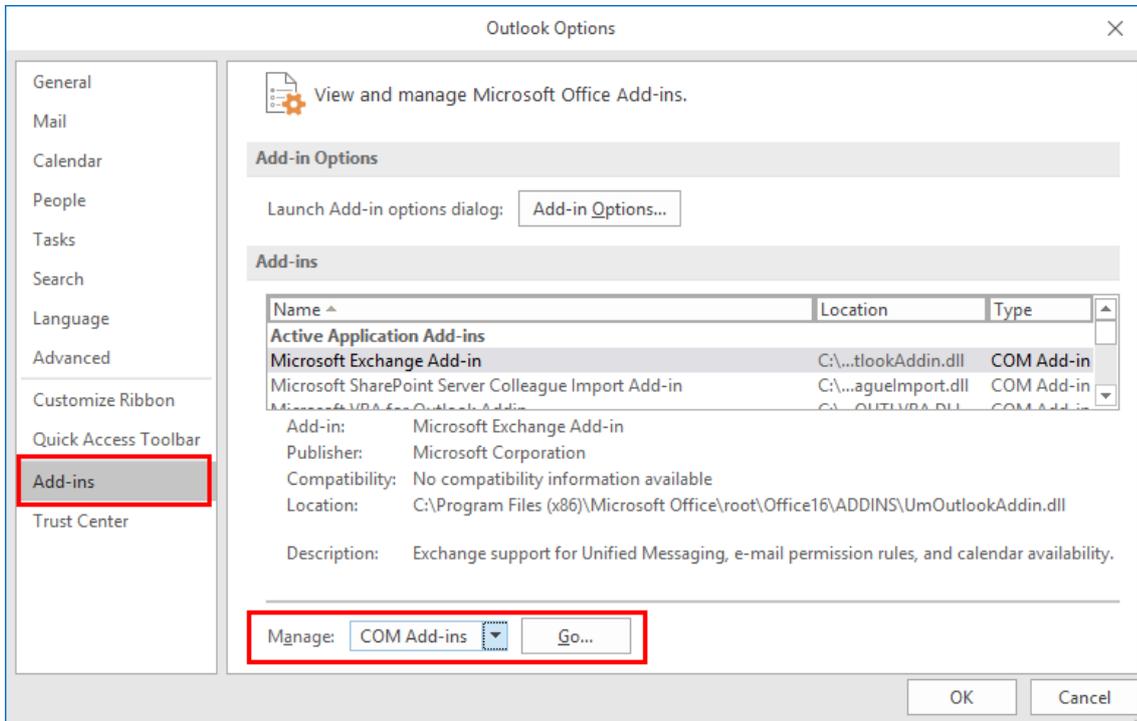
The Add-in **OutlookTextExpress** must be **activated**.

15 System Requirements

OutlookTextExpress runs under Windows Windows 7, Windows 8, Windows 10, Windows 11

Net 4.62 Framework or higher is required.

Outlook 2013, 2016, 2019, Office 365 (32 und 64Bit) is supported.

The Net-Framework can be downloaded from our website or directly from Microsoft.

16 Glossary of Terms

Add-In – An extension to Microsoft Outlook which adds functionality and improves usability.

Context Menu – The context menu is accessed by clicking on objects with the right mouse button.

Placeholder – A placeholder is a function of OutlookTextExpress to mark locations in text modules.

Repository – A repository holds all of the folders and text modules. There may be up to three repositories.

Ribbon – The ribbon is Microsoft's term for the menu bars in Outlook that are organized by tabs.

Text Module – Text modules are convenient sections of text and/or images which simplify communication.

Text Module Explorer – The text module explorer is a task pane which allows access to all text modules.

17 Contact

We enjoy any comments, questions, concerns or suggestions on improving OutlookTextExpress.

Thanks!

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